

UK Healthcare Providers' Guide



The future is exciting.

Ready?



Executive summary

Everyone agrees that healthcare organisations face significant challenges over the coming years.

Demand for healthcare is growing, costs are escalating, patients have complex needs, increasing expectations; and finances have seldom been tighter.

Yet if your organisation is ready, the future could be both exciting and rewarding.





The good news

Undoubtedly, the central challenge for healthcare providers sets the bar high: how to improve quality and access for patients whilst at the same time reducing costs.

But the good news is that if you are ready to embrace change and adapt your healthcare models to meet patients' needs, there exist real opportunities to improve services and increase efficiency in the years ahead.

This guide will introduce you to the latest trends in healthcare provision, and point you to exciting opportunities for future success. Get to know the strategies, tools and innovations helping organisations like yours succeed.

The changing face of healthcare

More of us are living longer, developing chronic diseases (sometimes due to lifestyle choices), which require costly, long-term care. This calls for a new kind of healthcare that is both integrated and dynamic, creating greater links between health and social care, family doctors and hospitals, physical and mental health.

The result? A collaborative approach between health and care professionals with distinct skills to create a "care chain", able to coordinate efforts in a way that is focused on the individual patient.

Spurred on by advances in technology, healthcare organisations are already adapting to create this new healthcare model, which is predictive, preventative and personalised.



Predictive, preventative medicine

It is increasingly important not just to heal the sick, but to anticipate issues before they become a problem.

This new kind of predictive medicine is arrived at by crunching Big Data to determine particular health risks and by encouraging lifestyle choices that prevent chronic disease.

The power of personalised care

The future of healthcare depends on providing personalised services that are tailored to patients' individual needs.

That means more accurate diagnosis and care plans, and the delivery of services where patients need it, when they need it. This is resulting in a shift from traditional primary care environments such as hospitals to the provision of care in the patient's home.

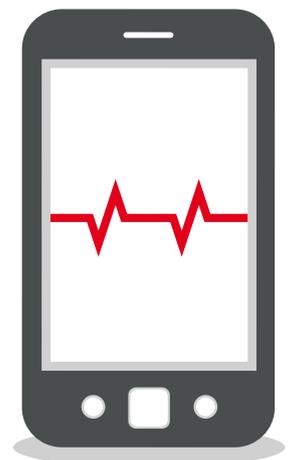
Home care can play an important part in transforming a patient's experience for the better and reducing hospital visits, bringing down costs. It is made possible thanks to more integrated teams of care workers and the use of mobile technology.

Relationships are changing

Providing personalised care means a more collaborative approach to your relationship with patients.

Thanks to the Internet, and to greater transparency throughout healthcare organisations, patients are better informed and more involved in decisions about their treatment. This increased knowledge raises expectations, with patients demanding the best care.

Crucially, you need to think of the patient-doctor relationship as more of a partnership than ever before. As you seek to improve care and to harness innovation, you need to answer one simple question: how patient-focused are you?



Trend watch



The population is ageing

10 million people in the UK are over 65 years old. Projections are for 15½ million elderly people in 20 years time and 19 million by 2050. (Source: ONS)

Globally the situation is even more acute, with the same demographic expected to more than triple over the next 50 years (Source: UN data).



Chronic diseases on the rise

In part due to our Western lifestyles, chronic diseases are on the rise, each with different care requirements.

People with long-term conditions now account for about 50 per cent of all GP appointments and over 70 per cent of all inpatient bed days. (Source: Kings Fund)



The cost of care is unsustainable

The NHS is facing a shortfall in funding of £30billion by 2020-21 (Source: NHS England).

Action is needed to reduce demand, and simultaneously increase efficiency and funding. .



Some diseases are preventable

A combination of regular testing, increased screening, healthier lifestyle choices and vaccinations can improve health.

The UK has one of the worst rates of obesity in Western Europe: 67% of men and 57% of women, and more than a quarter of children. (Source: The Lancet). The condition contributes to diabetes, cardiovascular diseases, stroke and cancer, but it is preventable.



Mobile Health is growing

Mobile health can cut costs, maintain and improve quality of care and reach patients in the most remote locations.

Mobile health apps relating to patient care (e.g. diabetes and heart diseases) are growing. The value of the global mHealth market is expected to reach \$49.1 billion by 2020 (Source: Grand View Research).

The Forward View of the NHS

In NHS England's Five-year Forward Report, published in 2014, NHS England Chief Executive Simon Stevens called for a radical upgrade in disease prevention and public health. This involves hard-hitting national action on obesity, smoking, alcohol and other major health risks; greater control for patients of their own care; and decisive steps to break down the barriers in how care is provided. Radical new care delivery options include multispecialty community providers; the integration of hospital and primary care providers; and the redesign of urgent and emergency care. (Source: NHS England)



'Home Sweet Home' is a real option

Healthcare is shifting from care in hospitals to care in peoples' homes, as remote sensors and 'wearables' make it possible to monitor patients remotely.

Emergency readmissions for people aged 75+ in English hospitals rose 88% between 1999/2000 and 2009/10. (Source: NHS England)



Security will remain a priority – for everyone

The ability to manage information securely and reliably remains a top priority. This extends to procedures put in place by healthcare administrators.

With 46% of security breaches coming through loss or theft of a computer device (Source: Verizon Enterprise), everyone needs to be accountable for protecting patients' information.



Patients expect more

Patients are better informed and more demanding, requesting healthcare earlier, more frequently and with a more personal approach.

In 2013, it was estimated that 340 million consultations in general practice were undertaken every year, up 40 million from 2008 (Source: NHS England).



The healthcare model is changing

Clinical Commissioning Groups (CCGs), created following the Health and Social Care Act in 2012, are responsible for about 60% of the NHS budget, or £60 billion per year. (Source: NHS).

89% of CCGs identify access to data and technology to support decisions and integration as a barrier to making improvements. (Source: PWC)

Opportunities for success

We believe your future success depends on three things: delivering better patient care, ensuring your people are better connected, and being innovative enough to deliver the services that patients need.

How do you deliver better patient care?



1

How do you deliver better patient care?

Ensuring peace of mind

Harry, 69, suffers from dementia. On a number of occasions he has wandered off, lost and forgetful, putting himself at risk and causing anxiety for his family. With the use of a simple 4G device, which Harry clips to his belt, he can now be located at any time. Should he wander off or get lost, a text can be sent to his family with his exact location, offering him continued independence and his family peace of mind.

How do you ensure your people are better connected?

2

How do you ensure your people are better connected?

Managing chronic disease more efficiently

Judy, 36, is a specialist diabetes nurse with a busy caseload of patients. Previously she would have had to see patients face-to-face. Now she is able to save time and help more patients by registering them for home care admission. She receives accurate, up-to-the-minute data on their progress from treatment and symptom diaries that the patients fill out themselves, and medical monitoring equipment that submits readings automatically. In addition, she is able to maintain contact with her company and colleagues and can see who is nearby on location at all times.

3

How do you harness innovation to become more agile and responsive?

Resolving complexity with an integrated solution

Alan, 45, directs IT Operations for the national organisation that provides blood, organ delivery and specialist tissue work across the UK. Time and reliability is often the difference between life and death, and accurate communication is vital to the smooth running of the services. By implanting an integrated communications platform, Alan and colleagues have been able to make sure that blood and organs are delivered in time to the right patient, securing a significant increase in the number of organs delivered.



1 Delivering better patient care

Traditionally, responsibility for better patient care has lain with individual healthcare providers. The key to future success will be in collaboration between different care providers and in enabling patients to take a greater role in their own health and treatment.

Here are five key areas in which you can improve patient care:

Give professionals the right tools for the job

Patient care is greatly improved by accurate, up-to-date information and diagnosis. Connected mobile devices and secure access to patient records within hospitals and on the road allow professionals to access the information they need to deliver the best care – wherever they are.

TIP: Check out profile managing software that allows your staff to separate personal and corporate identities on a single device.

Keep out of sight, not out of mind

Remote patient monitoring, including wearable devices and sensors, enable patients to receive care in their own homes, with constant monitoring and support via mobile services.

TIP: Research the latest technology in your sector – then contact suppliers for a trial.

Make it personal

Personalised care plans are based on a holistic view of the patient and their needs, and give them control of their own care. Stored on a central database, they can be accessed by the patient and their care team.

TIP: Create a consistent care plan protocol, helping practitioners to involve patients in diagnosis and treatment.

Hello?

Gamification

Alice, 9, is facing a potentially worrying stay in a large children's hospital for the treatment of her kidney disease. As a part of her induction, she receives a tablet that contains information about her stay in hospital and an explanation of her treatment plan. This information has been developed using typical elements of game playing (e.g. point scoring, competition with others, rules of play) to make otherwise dry material more engaging and fun.

Hi, how you feeling?

Encourage personal responsibility

Encouraging patients to take greater responsibility for their own health is empowering and cuts costs. Encouraging the use of health apps, particularly among the young, can help them make lifestyle choices that are right for them.

TIP: Establish a patient participation group to discover what patients think and to provide a platform to test ideas.

Improve access

Making sure patients receive the right healthcare at the right time is essential in disease prevention. Sometimes small changes – like being able to book an appointment online rather than wait on the telephone – can have a big impact.

TIP: Are you able to offer video, email and phone consultations? As well as reducing costs, many patients are willing to embrace alternative means of communication.



2 Ensure your people are better connected

Staying connected is a vital part of the future of healthcare provision. It's about making life easier for staff – reducing stress, boosting productivity and protecting personal safety – freeing them to focus on delivering the best patient care. Here are five areas you need to focus on:

Keep it simple

The management of appointments through mobile job scheduling is key in any patient-facing organisation. Ensuring everyone on your team has access to dynamic schedules (including patient information) that they can sync with others in the team can free up time to spend with patients.

TIP: Consider deploying a dynamic calendaring system that can be accessed in hospital or out on call.

Keep in contact

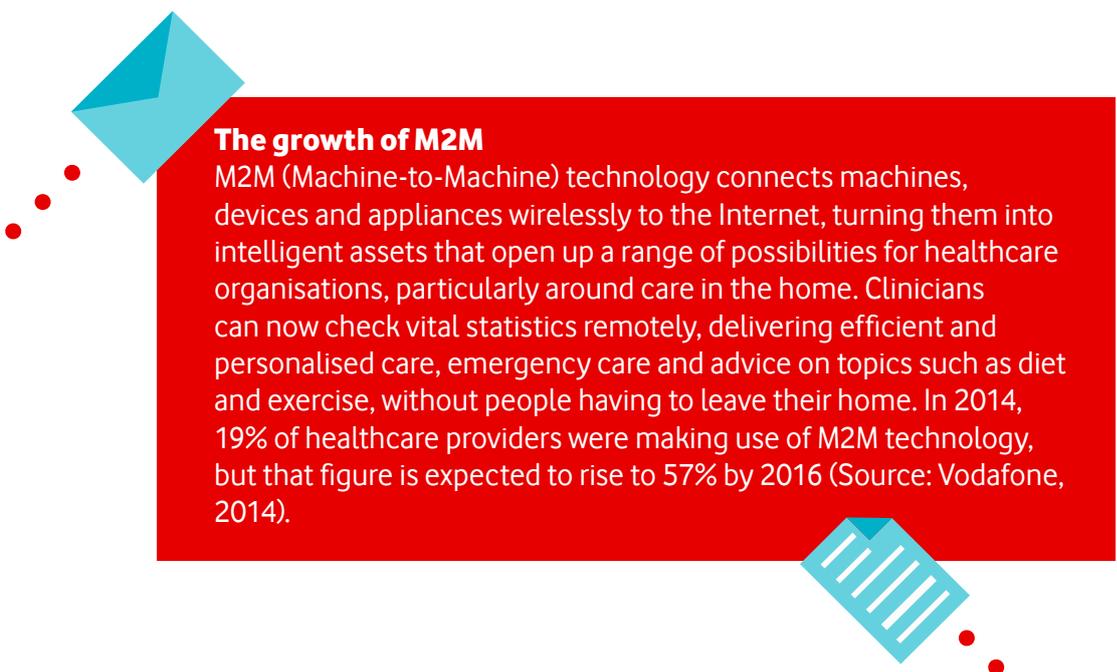
Patients rely on contact with practitioners for many reasons, from reassurance to diagnosis, yet contact needn't always be in person. Mobile technology, through video and phone calls, email and SMS, can provide vital touch points without time-consuming travel.

TIP: Explore SMS as a means of communicating with patients. Ubiquitous yet under-exploited, it is both direct and cost effective.

Stay on the move

The ability to access and enter data on tablets and with digital pen technology while on the move – either on ward rounds in a hospital or while providing home care out on the road – can save precious hours every week.

TIP: Use secure mobile devices to access and enter data as well as synch information with colleagues.



The growth of M2M

M2M (Machine-to-Machine) technology connects machines, devices and appliances wirelessly to the Internet, turning them into intelligent assets that open up a range of possibilities for healthcare organisations, particularly around care in the home. Clinicians can now check vital statistics remotely, delivering efficient and personalised care, emergency care and advice on topics such as diet and exercise, without people having to leave their home. In 2014, 19% of healthcare providers were making use of M2M technology, but that figure is expected to rise to 57% by 2016 (Source: Vodafone, 2014).

Think big

Accurate data is vital in the diagnosis and treatment of patients. Anonymised Big Data is able to draw on insights from a wider demographic that can be used to improve a patient's diagnosis.

TIP: Use Use Big Data, drawn from anonymised patient records, to start seeing trends – like what treatments work well in particular situations.

Put safety first

Healthcare professionals who go out into the community are vulnerable. Remotely managed alarms, monitored by the healthcare organisation, provide them with additional support.

TIP: Ask staff to consider remotely managed alarms as part of risk assessment procedures, and see where they might mitigate danger.



3 Being agile and responsive

To succeed in the future, you will need to strike a balance: maintaining reliable services whilst still remaining flexible and prepared for changes. Staying agile and responsive will help you provide innovative solutions to your patients' care and improve productivity.

Take advantage of the latest technologies

New technologies in fixed and mobile devices, cloud storage and the sharing of data are improving and developing healthcare provision at every level. But with so many changes, you need to take a hard look at how your systems are managed and integrated.

TIP: Set objectives. Ask yourself what you are trying to achieve: is it cost reduction or better service? It could be both, but by setting priorities early on there's a greater chance of success.

Control your costs

Sometimes even simple efficiency improvements, such as mobile job scheduling, can achieve great cost savings, but any changes can only be achieved with a thorough understanding of individuals' roles within your organisation.

TIP: Gain visibility, control and management of your telecoms resources through expense management, and start making reasoned decisions on your future communications strategy.

How tablet PCs can improve patient care

Nottinghamshire County Council is the ninth largest local authority in the country, employing 18,000 people with an annual budget of over £500 million. With more people receiving care in their own homes, the council needed a mobile solution to cut administration costs and increase the time that Adult and Social Care Teams spend with patients. The council deployed tablet devices to front-line workers so they could access emails, calendars and patient information on the move, as well as write up case notes and complete assessments. As a result, workers have more time to spend with patients and the council calculates eventual annual savings of around £4.7 million.

Meet regulatory demands

Systems of individual consent to the use of personal data are not well-constructed for the digital age. Governments and organisations are having to deal with an ever-changing regulatory landscape.

TIP: Put yourself in your patients' shoes. What information would you be willing to share, and what could compromise your privacy?

Maintain confidentiality of all patient data

Staying agile means remaining accessible to patients and professionals but impenetrable to hackers. Avoiding security breaches will take a combination of planning, technical expertise and business knowledge. Data encryption is key, particularly with mobile devices.

TIP: Take stock of everything you own and use. It's vital to review potential risks and ensure protection.



What next?

At Vodafone, we've been thinking a lot about the new opportunities for healthcare organisations, and how your own organisation can adapt in the coming years.

Have we got you thinking too?

If you'd like more insight into how you can build your business in the ever-changing world of healthcare, then check out our **Action Plan**. It's a checklist of the steps that we recommend you take to ensure that your business is ready wfor whatever the future brings.

Talk to us about how we can help your organisation.

Contact your account manager, call us on **0845 894 2710**
or visit our website at **www.vodafone.co.uk/publicsector**

The future is exciting.
Ready?

Vodafone 2015. This document is issued by Vodafone in confidence and is not to be reproduced in whole or in part without the prior written permission of Vodafone. Vodafone and the Vodafone logos are trademarks of the Vodafone Group. Other product and company names mentioned herein may be the trademarks of their respective owners. The information contained in this publication is correct at time of going to print. Such information may be subject to change, and services may be modified supplemented or withdrawn by Vodafone without prior notice. All services are subject to terms and conditions, copies of which may be obtained on request.

