Scaling Telehealth Specialist Care for Growth and Impact

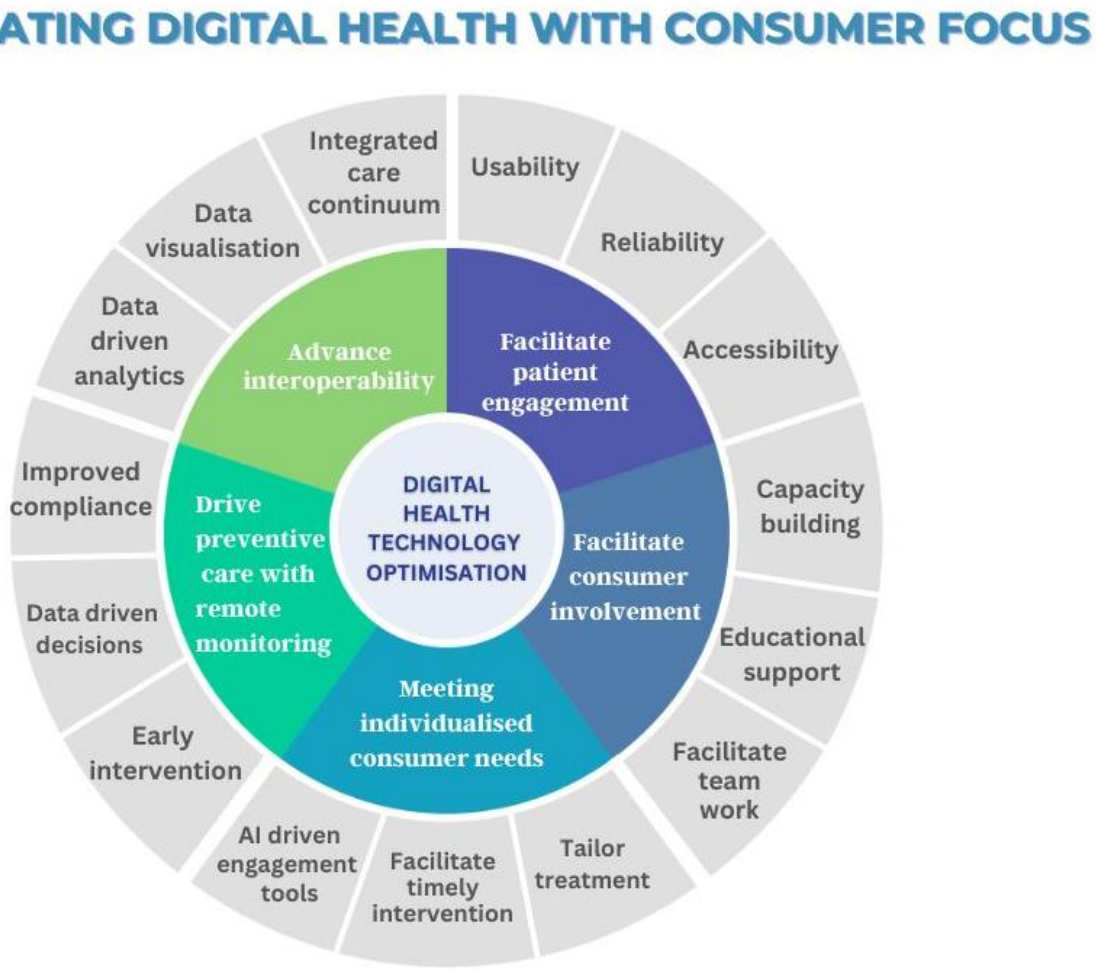
Case Study, November 2024

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AGENDA

#1	Introduction and Market Opportunity
#2	User Research and Segmentation
#3	Patient Journey Mapping and GTM Strategy
#4	Key Considerations for Pricing and Experimentation
#5	Product Launch Plan based on RICE Prioritization Framework

Digital Health Trends



Source:Digital and Mobile Technologies to Promote Physical Health Behavior Change and Provide Psychological Support for Patients Undergoing Elective Surgery: Meta-Ethnography and Systematic Review

1. Introduction and Market Opportunity in Singapore

BUSINESS VISION

To be premier platform for top quality specialist healthcare which is accessible for critical needs in elderly care, chronic disease management, mental health and family wellness.

WHY NOW?

Traditional healthcare has limited access to specialists and long waiting times. **High demand** for convenient, home-based or virtual consultations especially for rising chronic diseases with aged patients.

42% increase in telehealth adoption post-COVID with growing preference for specialist services via Digital Platforms. ***60% of SEA users are mobile-first users*** including caregivers for elderly.

Opportunity for <> to build Trust and Usability
<> is positioned to lead due a established regional footprint, scalable infrastructure and trusted partnerships to extend into specialist care.

Speedoc	Homage	WhiteCoat	MyDoc
In-home care services, virtual hospital model	Home-based specialist care, focus on elderly patients	In-app consultations, insurance partnerships for coverage	Integrated health records, seamless insurer integration

Local Singapore competitors that operate in Specialist Care focus on integrated home based care and AI-driven diagnostics. Other regional players also have strategic partnerships with Insurance companies and Super App ecosystems like Grab.

The competition landscape highlights the necessity to differentiate itself.

Business Impact



Revenue Growth via High Value Segment



Increase Customer Retention and Brand Loyalty



Bundled cross-selling and up-selling opportunities



Personalized data insights for targeted health solutions



Strategic partnerships and enhance B2B revenue streams

User Research and Segmentation

2.2 User Research and Segmentation

Demographics	Needs and Behaviour	Pain Points	Opportunity
Elderly Patients (65+) 👴👵	1. Comprehensive chronic care management, regular follow-ups, and home-based care to avoid hospital visits 2. Prefers telemedicine for follow-ups, family involvement in care management, values continuity of care	1. Limited mobility 2. High risk of comorbidities requires coordinated and personalized in-home care	1. Focus on integrated services for elderly patients, providing a hybrid of telemedicine and in-home care 2. Option to include caregivers in consultation 3. Population projected to rise to 23.8% by 2030
Chronic Disease Patients (40-65) 🛏️	1. Regular access to specialists, structured health monitoring, dietary and lifestyle management 2. Engages in telemedicine for convenience, seeks reliable follow-up reminders and consistent provider access	1. Difficulties in coordinating care, inconsistent follow-ups 2. High cost of specialist consultations	1. Introduce subscription-based care packages for chronic conditions, covering specialist access, regular check-ups, and reminders 2. Establish insurer partnerships for better cost management and coverage
Young Adults (25-45) 👩‍💻	1. Quick access to dermatologists, orthopaedists, mental health specialists, and women's health experts 2. High adoption of mobile health apps, looking for easy-to-access services during off-hours, willingness to pay for quick and accessible care	1. High costs / low spend capacity 2. Limited after-hours time for appointments hence preference for remote consultations with minimal wait times	1. Offer on-demand virtual specialist consultations with flexible timings for accessible lifestyle related services 2. Offer affordable mental health solutions prioritizing anonymity
Parents and Families 👨‍👩‍👧	1. Paediatric consultations, mental health support for children and adolescents, women's health, especially prenatal and postnatal care 2. Regular users of telemedicine platforms for child health, values long-term trusted relationships with providers	1. High wait times for paediatric specialists due to limited access to quality care 2. Concerns around safety	1. Offer family-focused specialist care packages that cover paediatric, prenatal, and postnatal care 2. Integrate flexible scheduling and in-app tracking for follow-ups and child wellness consultations

2.3 Most Promising User Segment to focus on initial MVP

Why focus on Chronic Disease Patients for Initial MVP?

1. **High Frequency of Use** – This group requires ongoing, specialized medical attention for chronic conditions with frequent follow ups
2. **Convenience** – Many patients prefer telehealth to reduce physical travel especially with multiple conditions
3. **Comprehensive Care** – Patient value continuity of care from initial consultation to treatment and monitoring

✓ **User Acquisition and Adoption** – Catering to aged patients only requires high acquisition costs as Digital Marketing may not reach its intended users (elders or caregivers). Lack of trust and low digital awareness makes it challenging to focus on older patients

✓ **User Retention** – Catering to young working adults could result in reduced CLTV as customer loyalty is highly dependent on time and cost sensitive users

⭐ Key Drivers

Common drivers for Specialist Care patients are Wait Time, Convenience, Cost and Access to Trusted Quality healthcare professionals. Ease of follow-up and Insurance coverage are other priorities.

How MVP Solution addresses

Limited Specialist Availability

On-demand access to specialists across key fields like cardiology, endocrinology, and pulmonology

High Consultation Costs

Offer affordable packages or subscription-based plans covering regular check-ups and access to specialists

Lack of Care Coordination

Implement integrated digital health records for continuity, allowing patients and doctors to access care histories

Difficulty in Managing Follow-Ups

Provide easy scheduling, automated reminders, and follow-up tracking for seamless care continuity

Inconsistent Insurance Coverage

Partner with insurers to offer coverage for chronic care and create cost-efficient service packages

✓ **Fragmented Care Journey**

End-to-end care model within app, from screening, diagnosis to treatment plans and remote monitoring to lifestyle management

End to End Patient Journey Mapping and GTM Strategy

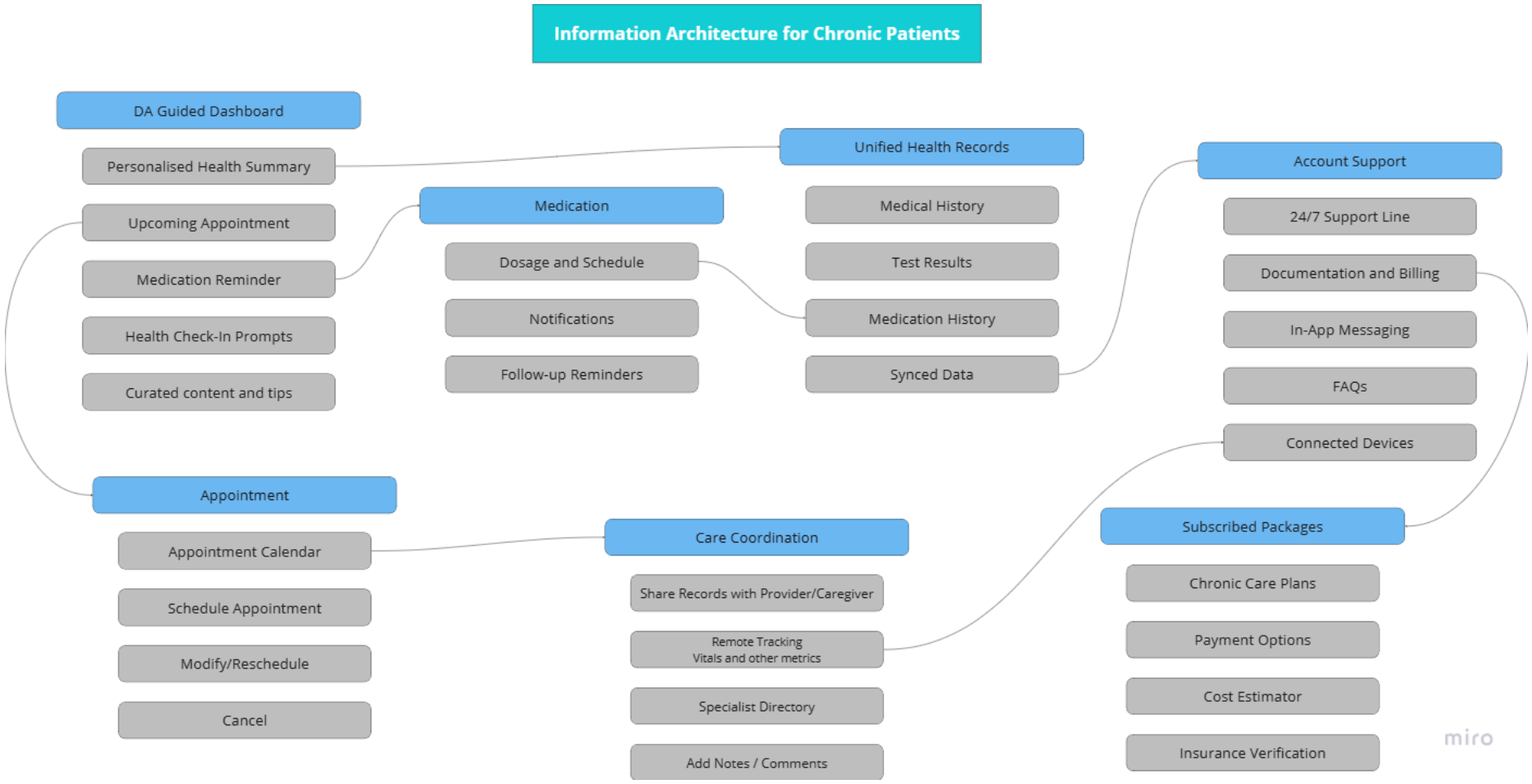
3. Overview – Specialist Care for Chronic Patients

The Platform can leverage the existing features for GP Care, while taking a enhancement driven approach for end to end chronic patient and specialist care journey.

By tailoring the interface, usability can be first improved for Improved Task Completion Rates and Satisfaction Ratings.

User Acquisition and Adoption – Simplified onboarding with affordable plans for ease of use.

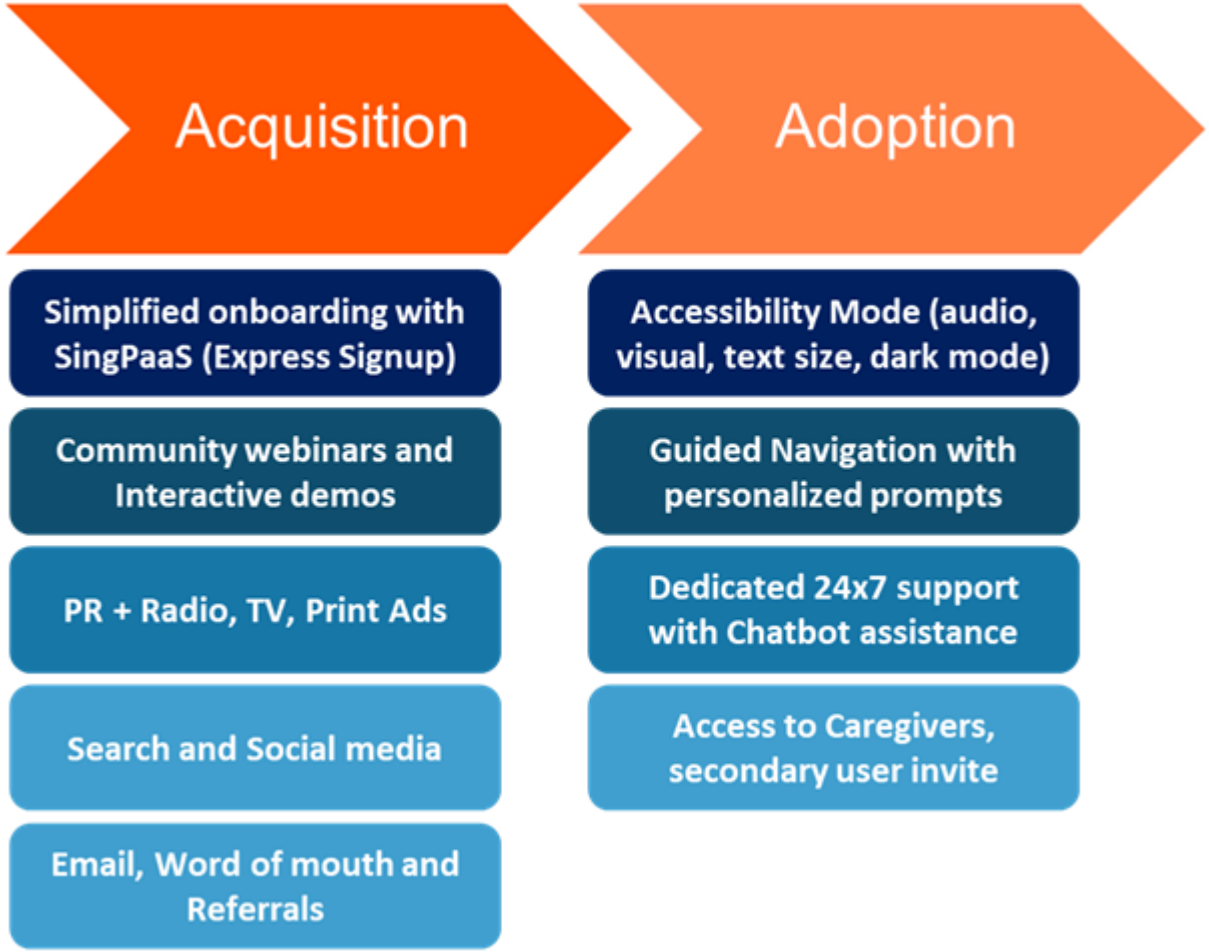
User Retention and Engagement – Personalized care reminders and tailored content to add long term value for users.



3.1 Journey Map – Chronic Patient for Specialist Care

Acquisition	Adoption	Retention	Engagement
Simplified onboarding with SingPaaS (Express Signup)	Accessibility Mode (audio, visual, text size, dark mode)	Periodic Wellness Checks	Loyalty program (highlight time and cost savings)
Community webinars and Interactive demos	Guided Navigation with personalized prompts	Recommendations and tailored health Insights	Referral Rewards and Gamification
PR + Radio, TV, Print Ads	Dedicated 24x7 support with Chatbot assistance	Feedback experience via surveys	Health Education Content and Group Forums
Search and Social media	Access to Caregivers, secondary user invite	Multi-language support	
Email, Word of mouth and Referrals			

3.2 Key Considerations for User Acquisition and Adoption



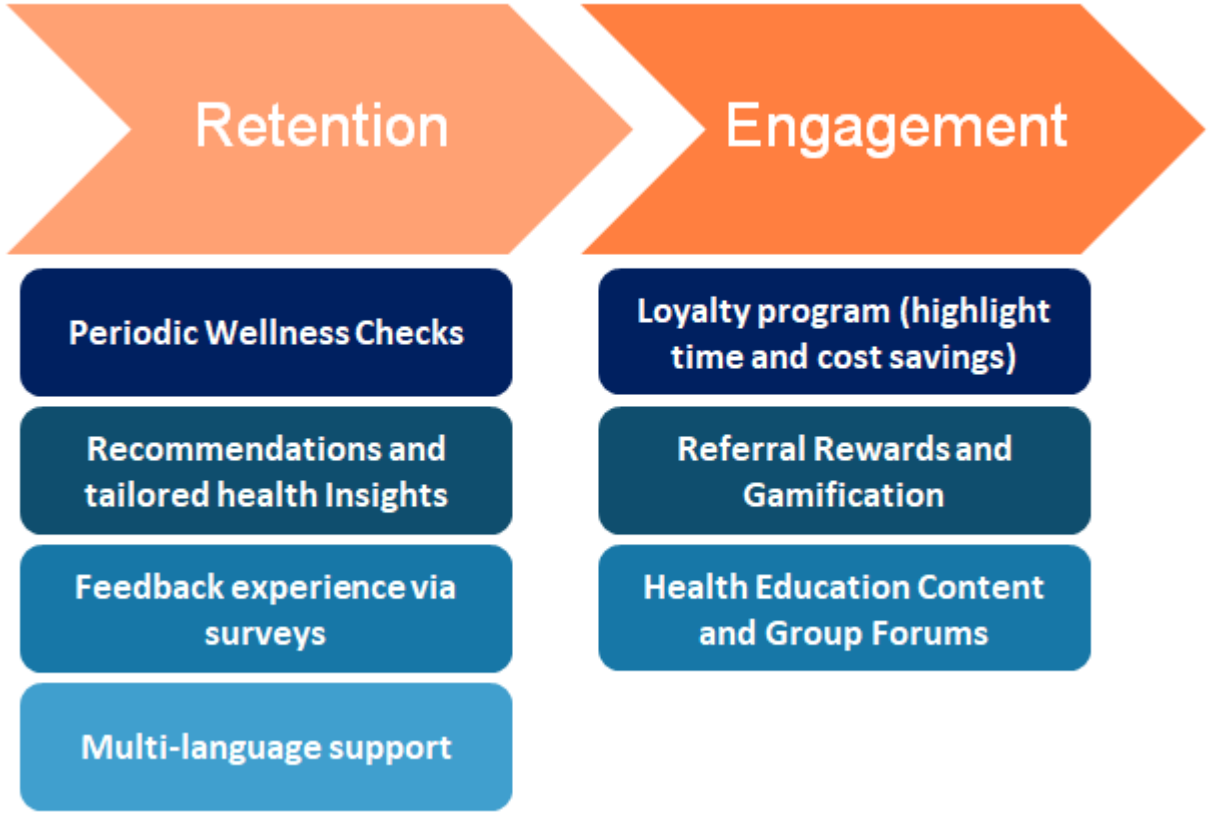
GTM Investment
1. Establish strong partnerships with specialist doctors, hospitals, insurance groups
2. Leverage media with Ad Campaigns and Success Stories
3. Adherence to health regulations and data compliance
4. Showcase community trials to gather usability feedback

GTM Risks
1. Complexity in implementation and scalability challenges for 24x& support
2. Low adoption if onboarding is cumbersome
3. Lack of compliance with MOH guidelines for health recommendations
4. Low levels of advocacy if trust is not built and rewards lack value

Initial Tech Enhancements
1. Build robust Accessibility Mode features (screen readers, adjustable text sizes)
2. NLP-driven chatbot with escalation for live support

METRICS			
Ad Conversion % + CPA	New User Signup to 1st Appointment %	Dropoff % during booking	Avg Chatbot Response Rate

3.3 Key Considerations for User Retention and Engagement



Long Term GTM Plan
1. Collaborate with Lifestyle Apps to offer integrated solutions
2. Expand Specialist/Patient network via Digital Credentials, QA/KYC to maintain high standards

Advanced Tech Investment
1. AI-driven recommendation engine for personalized insights
2. Multi-language capabilities to expand to diverse user groups
3. Multi-user profile management for caregivers and patients
4. Validate AI solutions with focus on data governance and relevancy
5. Scalable tools which require regular device syncing

Risk Mitigation
1. Fairness and Quality Checks to avoid data mismatches, loss of historical data, bias in AI Models
2. Moderating forums, chatbots to avoid misinformation and poor security
3. Stress testing for peak usage

METRICS			
Renewal / Churn Rate	**MAU and Weekly Stickiness**	**User Satisfaction Score / Playstore Rating**	**Repeat Consult Rate**

3.4 User Workflow and Signal examples

User Signup, First-time visitors

Touchpoints

1. SMS and email campaigns for targeted demographics
2. Provide clear instructions and auto-fill data options for quick registration
3. Highlight features like Accessibility Mode / Guided Navigation during onboarding to demonstrate inclusivity and personalisation

Value: Seamless, intuitive registration and profile setup builds trust, encourages users to explore features fast with minimal friction

Long-term users with chronic conditions, frequent consults

Aha Moments

1. In-App Notifications / Banners to receive personalized health insights or reminders
2. Gamified emails showing progress in the loyalty program and highlighting rewards
3. *"Based on your recent consultation, here are next steps: [Recommendation Link]. Book your follow-up for 10% off."*
4. *"Caregiver access is live! Add family members to monitor appointments and prescriptions anytime."*

Value: Drives engagement with premium features for chronic care management

Cost-sensitive users who browse, abandon, report issues

Aha Moments

1. Ads and promotions targeted via email and social media platforms highlighting transparent pricing
2. Exclusive webinar invitations through email campaigns segmented by condition
3. "Caregiver access is live! Add family members to monitor appointments and prescriptions anytime."

Value: Reinforces affordability and builds confidence in the platform

Pricing Considerations

4.1 Key Considerations for Pricing – Revenue Streams



#1 Specialist Virtual Consult (Flat fee)

- Free signups/trials and Promotional Pricing for 1st time users
- Include Accessibility Mode and Caregiver Access as part of standard subscription
- Dynamic pricing based on Specialist expertise and demand
- Monetize advanced Caregiver tools and Recommendations as Premium features
- Free access to forums and health content; premium tier for exclusive webinars or expert consultations



#2 Panel Specialists

#3 Speciality Clinics

- Offer Value Added Services
- Negotiate higher commissions for patient referrals
- Premium subscription for priority access and referrals to Physical Specialist Clinics



Bundled Packages

- Combine virtual consultations, panel specialists, and in-clinic services into unified subscription plan for multi consultation and visits
- Upselling and Cross-selling Opportunity with Discounts for pre-existing virtual consulted patients (membership plans)
- Provide Realtime cost estimation tools and insurance based pricing models

METRICS

#1 Avg Revenue per Consultation / Patient

#2 Total Commission Revenue

#3 Clinic Occupancy Rates

4.2 Key Considerations for Pricing and A/B Experimentation



#1 Tele-Specialist Flat Fee revenue stream

1. Evaluate **subscription** models vs **standalone** usage. Test and adjust subscription tiers based on **demand** and frequency
2. Analyze how **localized** pricing impacts patients in underserved areas
3. Use A/B tests to implement variable flat fees based on complexity of the specialist's expertise or chronic condition severity
4. Test pay-per-outcome model if health metrics are not met

#2 and #3 Commission-based revenue stream

1. Define test groups (e.g., first-time users, recurring patients) and measure conversion, retention, and CLTV
2. Iteratively refine effectiveness of **promotions** and **loyalty** rewards based on data insights for patients using both virtual and physical consultations

Leverage on existing Technology

To scale Customer Data Platform (CDP)

1. Build **robust data pipelines** to ingest and process user behaviour data from Analytics tools
2. Incorporate **rules for targeting segments** with **minimal latency** and **Realtime In-App experience**
3. Create a **pricing engine** that factors **personalisation** such as Specialist Type, Severity, Frequency and Geography

☆ North Star Metric

Customer Lifetime Value (CLTV)

Total Revenue from Customer over entire Chronic Patient Care journey.

Focusses on long term **profitability** that justifies user acquisition and improves user retention.

Product Launch Plan

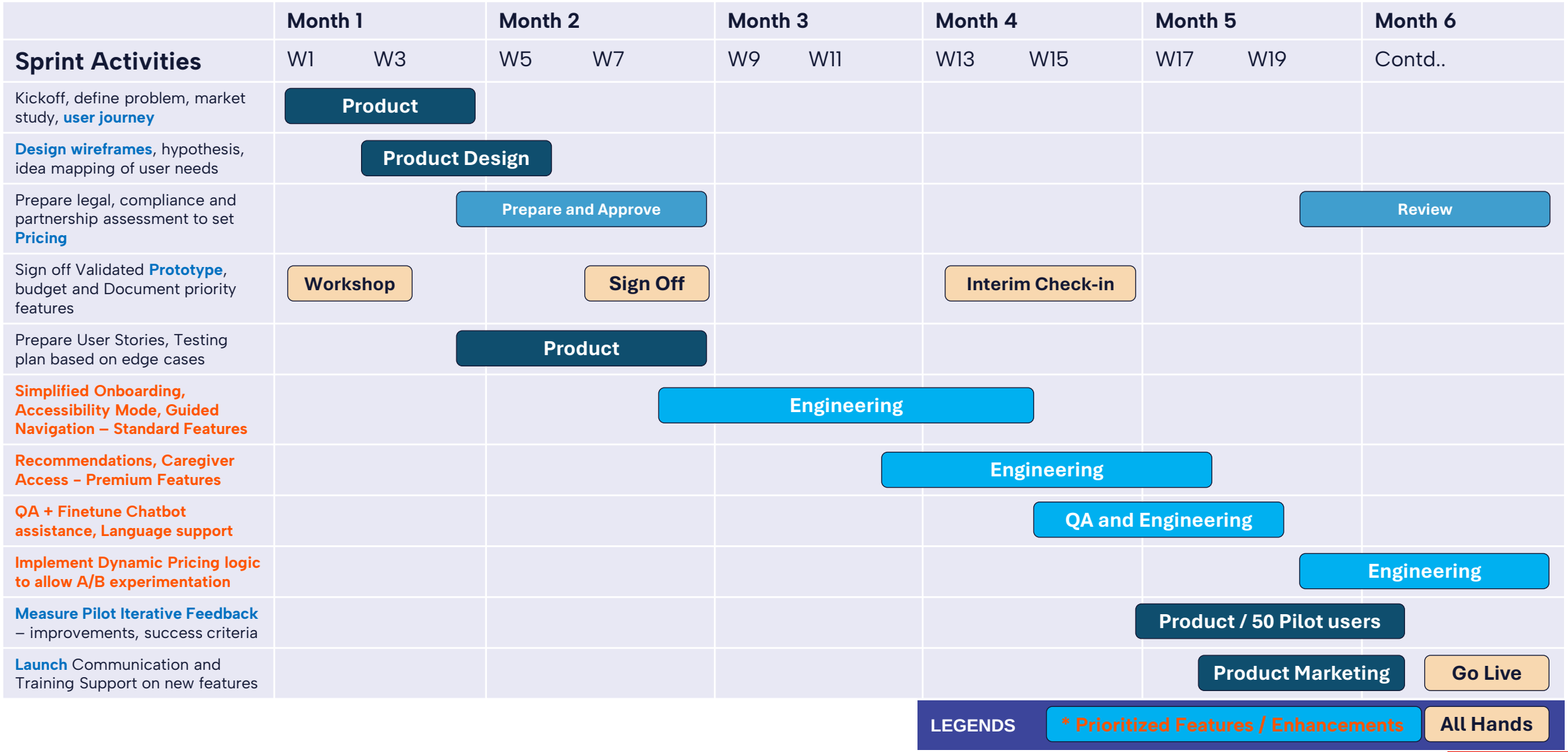
5.1 Prioritization of MVP Features based on RICE Framework

Features	Reach (1 to 100)	Impact (1 to 5)	Confidence	Effort	PRIORITY
Simplified Onboarding (Standard)	80	5	90%	5 Weeks	1
Accessibility Mode (Standard)	70	4	80%	6 Weeks	2
Guided Navigation (Standard)	60	4	80%	7 Weeks	3
Caregiver Access (Premium)	50	4	80%	6 Weeks	4
Personalization and Recommendations (Premium)	40	4	80%	8 Weeks	5
Dynamic Pricing Logic for A/B Tests	30	5	80%	10 Weeks	6
QA + Fine-tune Chatbot Assistance	90	3	90%	15 Weeks	7
Multi-Language Support	60	3	80%	10 Weeks	8
Health Journey Dashboard	50	3	70%	6 Weeks	9

Setup Quarterly All Hands Workshop to align on

1. Focus initial efforts on Simplified Onboarding and Accessibility Mode to cater to **Usability**. Premium features to be targeted for later sprints to ensure resource alignment with immediate priorities. Dynamic Pricing can be deprioritized until basic features are stabilized. Post-launch, iteratively enhance lower-priority items like the Health Journey Dashboard based on user feedback.
2. Incorporate **Health and Data compliance** standards to synchronize Access Control, Tracking and data storage
3. Plan Phased integrations and enhancements of 3rd party tools for Video chats, Maps, Emailing and Alerts, Insurance and Lifestyle apps
4. Assess resource planning and budgeting along with inbound and outbound **Marketing** and costs per channel
5. Feedback loop for Continuous Improvement and identify whitespace opportunities for Innovation

5.2 Product Launch Plan – MVP



Appendix

- https://govinsider.asia/intl-en/article/ihis-singhealth-moht-five-digital-health-trends-to-watch-in-singapore
- https://www.vcdoctor.com/blog/4-ways-telehealth-can-support-chronic-disease-management
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Appendix

Enterprises have a prioritized list of features/offerings that they seek in patient and member engagement platforms



While seamless integration is one of the most important features, personalized modules and AI capability have also seen substantial demand among enterprises

Key features prioritized by healthcare enterprises in their selection of patient/member engagement platforms



Reference: https://www.linkedin.com/events/7231285116294021120/

THANK YOU