

Differentiation for Pediatric Urgent Care Operators

Strategies for Gaining Market and Mind Share in an Increasingly Crowded Urgent Care Marketplace

Alan A. Ayers, MBA, MAcc
Vice President, Strategic Initiatives
Practice Velocity, LLC

Mastering the “Retail Elements” of Urgent Care



Consumer-driven venue for low-acuity medical services recognized for:

- High-traffic, high visibility locations
- Extended evening and weekend hours
- Walk-in, on-demand convenience
- Short waits with rapid throughput
- Lower cost than the ED
- Customer service emphasis

Blurred Lines Between Walk-in Providers



Virtual Visit
NOW AVAILABLE
24/7 care from your phone, tablet or computer.

24/7 NO APPOINTMENT PRESCRIPTIONS AS APPROPRIATE \$49 PER VISIT

Urgent care is a “lower cost alternative to the emergency room” and “overflow/after-hours for primary care.” So is...

- Family Medicine Group Practice with Extended Hours and Walk-in Appointments
- After-hours Pediatrics w/Moonlighting Docs in a Retail Setting
- Nurse Practitioner Clinic inside a Food/Drug/Mass Retailer
- Freestanding Emergency Room Center
- Hybrid models:
 - Urgent care center staffed only by mid-levels
 - Urgent care center with advanced diagnostics and observation capabilities

Urgent care’s value proposition gets confused and diminished by so many competing options, some of which are more convenient and cost less than urgent care

Saturation of Major Markets



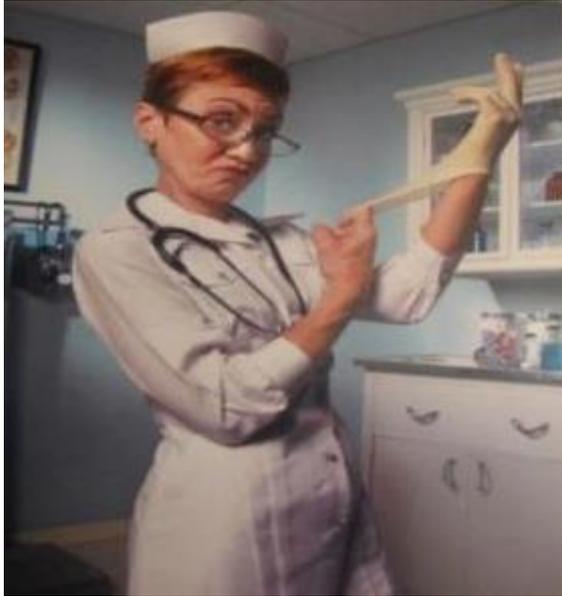
Charleston, SC Population: 127,000 (664,000 in MSA)
Number of Urgent Care Centers: 44

The Sea of Sameness



Consumers generally view all urgent care centers as “equal.”
Few centers have established differentiated brands.

What Business Are You In?



Merely delivering a “service” makes for a commodity provider that by definition has no brand loyalty and no competitive advantage.

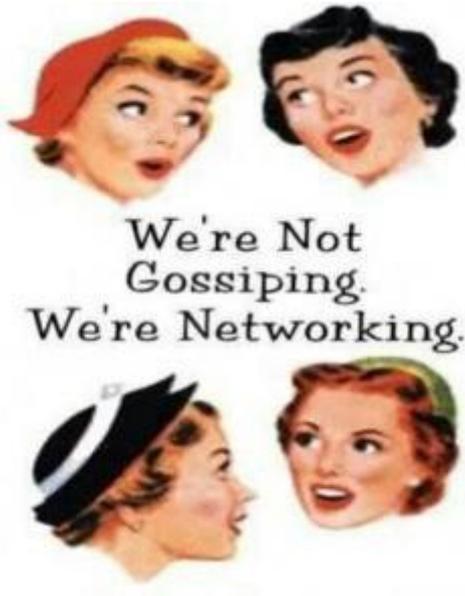
Success in urgent care requires resolving the medical problem that is the reason for the patient’s visit—efficiently and courteously—in a way that creates a *positive emotional connection* with the patient.

Value of Positive Patient Experiences

- Urgent care is in the “patient satisfaction” business—in consumer eyes *comparable to* retailers, restaurants, banks and other service providers.
- Long-term success requires capturing *repeat business* and generating *positive word of mouth*.
- Patients evaluate the *quality* of their urgent care visits based on *clinical outcomes* and their *feelings about the experience*.
- Patients who don't like the experience provided, don't value it, or don't think it meets their needs or expectations *won't come back*.

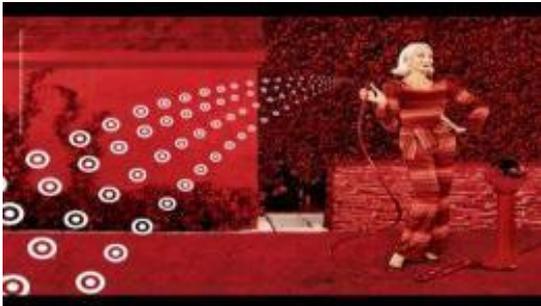


New Era of Word of Mouth Marketing



- A “good experience” is defined as:
 - Minimal hassle with processes, systems, and policies
 - No surprises on payment or financial terms
 - Minimal wait times and total time invested
 - Employee engagement in customer service
 - Medical outcomes -- value for the price paid
- Patients with negative experiences will tell others, complain to external agencies, and switch to competitors.
- Internet social media has accelerated the diffusion of good and bad experiences.
- Reach has expanded from a handful of “real” friends to potentially thousands of “virtual” friends.

Differentiation in Retail



Differentiation in Retail, cont'd.



Differentiation is not...







Virtual house call 24/7 for \$10

[GET CARE NOW](#)

Virtual CARE

[Learn More About Virtual Care](#) | [FAQs](#)

Virtual Care: Phone and Video Chat Health Care

Sore throats, sinus infections, coughs and allergic reactions don't make appointments. You shouldn't have to either. So if you need urgent care, consider receiving that care from the comfort of your own home. Call or visit us online. No appointment needed.

Knowing what level of care to access will save you time, money, and headaches. Consider CHI Health Virtual Care when you need minor medical attention any time, any where.

No Appointment Necessary

CHI Health Virtual Care is a 24/7 health care service available via phone or video chat. Receive consultations and even prescriptions for minor illnesses from anywhere - available at a discounted rate of \$10, for a limited time. Just call **1-844-355-CARE** or [visit us online](#), answer a few questions about your issue, request a virtual visit, and you will be speaking to a live health care provider in minutes.



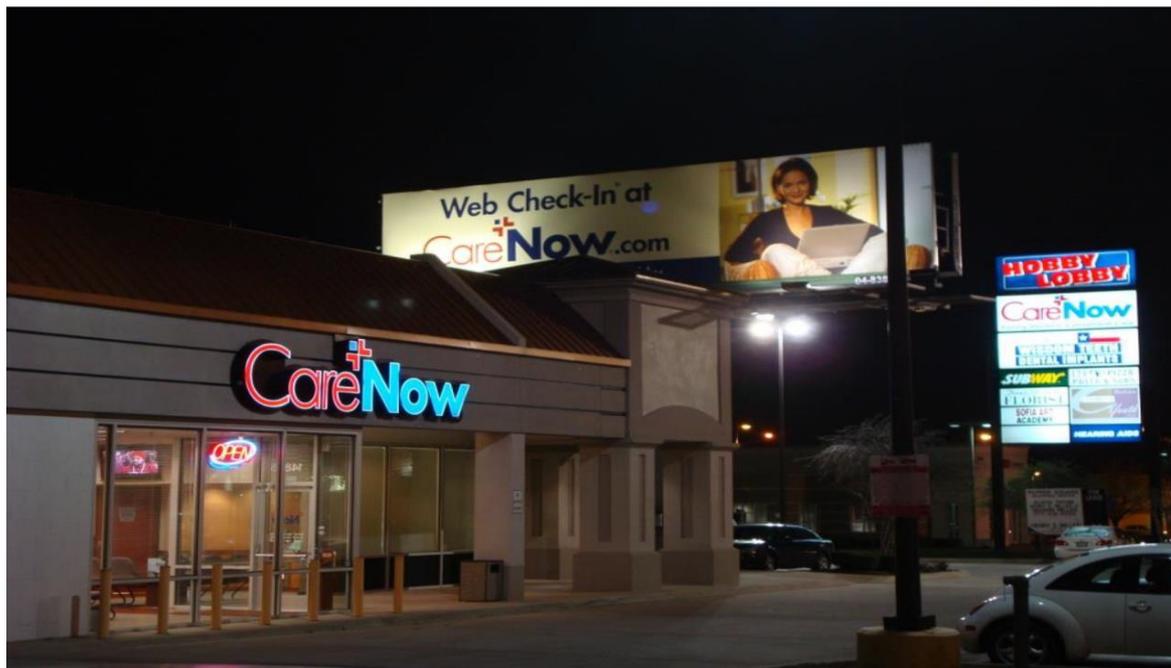
[Get Care Now](#)

\$10 for a limited time

What urgent care typically markets:

- What's important to doctors
- What patients can't see or understand
- Board certified physicians
- Digital x-ray, CLIA-certified lab, and/or EKG on-site
- Electronic medical record
- In-network insurance provider

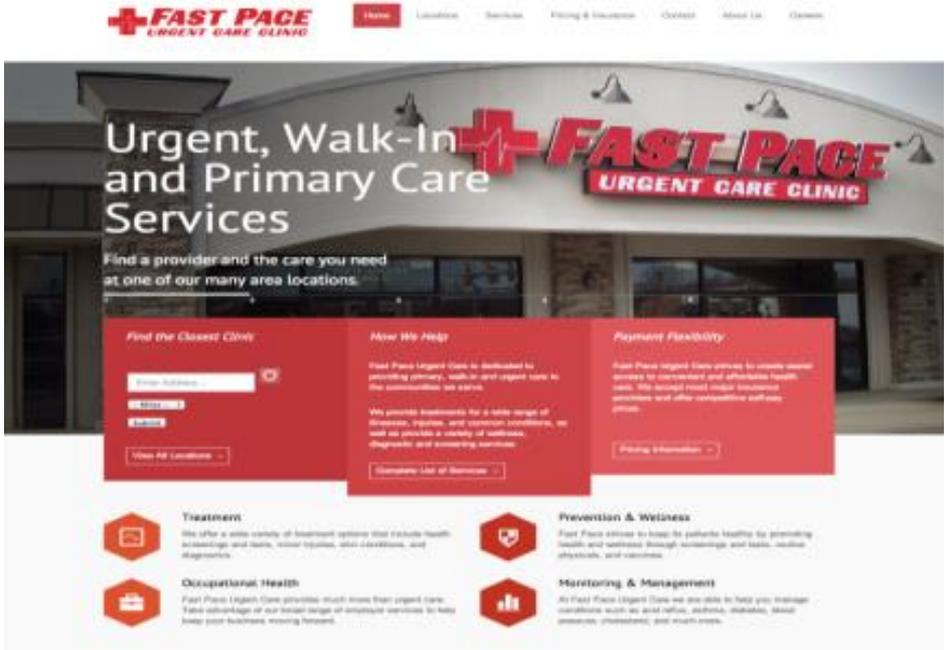
CareNow Web Check-In



Zoom+: Integrated Delivery System on an Urgent Care Platform



Fast Pace: Focus on Rural Markets



Kaiser Permanente: Raising Urgent Care Acuity in a Capitated System



Kaiser Permanente Urgent Care

VIRGINIA
Reston Urgent Care
 1890 Metro Center Drive, Reston, VA 20190
 Tysons Corner Urgent Care Plus **24/7**
 8008 Westpark Drive, McLean, VA 22102
Woodbridge Urgent Care
 14139 Potomac Mills Road, Woodbridge, VA 22192

MARYLAND
Camp Springs Urgent Care
 6104 Old Branch Ave., Temple Hills, MD 20748
 Gaithersburg Urgent Care Plus **24/7**
 655 Watkins Mill Road, Gaithersburg, MD 20879
Kensington Urgent Care
 10810 Connecticut Ave., Kensington, MD 20895
Largo Urgent Care Plus **24/7**
 1221 Mercantile Lane, Largo, MD 20774
South Baltimore County Urgent Care Plus **24/7**
 1701 Twin Springs Road, Halethorpe, MD 21227
White Marsh Urgent Care
 6920 Campbell Blvd., Nottingham, MD 21236

WASHINGTON, D.C.
Capital Hill Urgent Care Plus **24/7**
 700 2nd St. N.E., Washington, D.C. 20002

Kaiser Permanente Core Hospitals

VIRGINIA
 Reston Hospital Center
 Stafford Hospital Center (available early 2014)
 Virginia Hospital Center

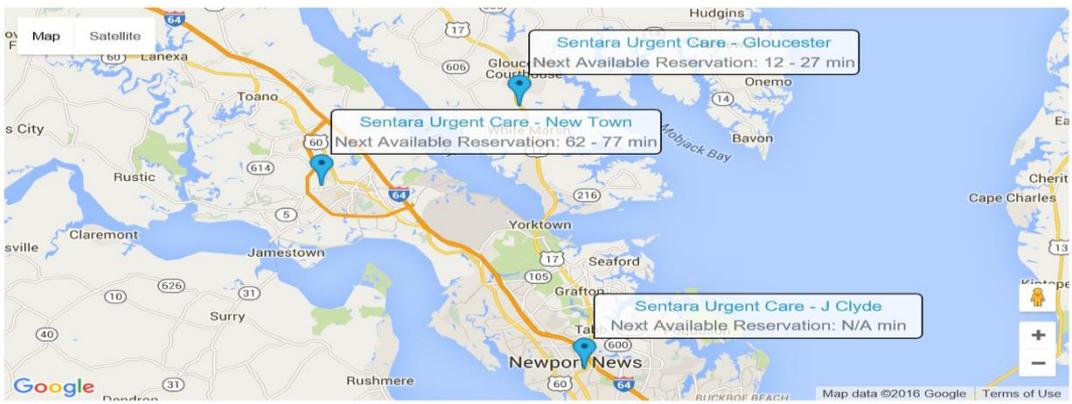
MARYLAND
 Greater Baltimore Medical Center
 Holy Cross Hospital
 St. Agnes Hospital
 Suburban Hospital

WASHINGTON, D.C.
 Children's National Medical Center
 Sibley Memorial Hospital (labor and delivery only)
 Washington Hospital Center

Sentara: Marketing Wait Times, Patient Satisfaction Scores



#	Name	Type	Call Back Time
1	John S	Walk-in	14 - 24 Minutes
2	Jane S	Walk-in	00 - 00 Minutes
3	John D	Online	
4	Jane D	Walk-in	
5	Phillip H	Walk-in	



Sentara Urgent Care - New Town
 4374 New Town Avenue
 Williamsburg, VA 23188
 (View Map)
 757-259-1900
 ★★★★★ 4.7 out of 5

Next Available Reservation: 55 - 70 min

[RESERVE MY SPOT](#)

Pediatric Urgent Care Differentiators



- Age restrictions for patients treated
- Equipment, supplies and clinical expertise focused on children
- Staffing by board certified pediatric physicians and pediatric PAs/NPs
- Kid-friendly décor and child-friendly patient experience
- Strong referral relationships with local pediatricians/pediatric groups/specialists
- Evening and weekend operating hours only

Hospital Pediatric Urgent Care



- Brand halo of the academic children's medical center
- System interconnectivity with the hospital, ancillary services, primary care and specialists
- Hospital-based clinic licensed as hospital outpatient department
- ER rates with facility fees charged
- Medicaid: Traditional, Managed, CHIP
- Urgent care as a channel for building pediatric marketshare

Applying Service Industry Concepts to Urgent Care: People and Culture



- In retail, everyone is a marketer. Everyone should look at how everything in the organization impacts the customer.
- Health care has an inherent advantage over other service industries—*people go into health care to help people.*
- Leading people to deliver great service entails:
 - Developing a patient-focused culture
 - Positive energy, teamwork
 - Systems, processes, and policies to drive throughput
 - Transparency in financials, key performance indicators
 - Gamification of increased profits, cost savings

What Patients Want and Expect



Focus on Throughput: Practicing Urgent Care Medicine,
Maximizing Provider Efficiency, Reducing Non-Value Added Activities

Functional Shifting



Contact Information



Alan A. Ayers, MBA, MAcc

Vice President of Strategic Initiatives

Practice Velocity, LLC

(779) 888-0734

aayers@practicevelocity.com