

A large, stylized blue chevron graphic pointing to the right, serving as a background for the main headline.

High performance. Delivered.

Insight Driven Health

Patient Engagement: Digital self-scheduling set to explode in healthcare over the next five years

By the end of 2019, **66%** of US health systems will offer digital self-scheduling and **64%** of patients will book appointments digitally, delivering **\$3.2 billion** in value and a competitive boost for health systems.

Leading health systems are shifting away from the telephone for patient appointment scheduling

Driven by patient demands for greater convenience and more control, US health systems are adopting digital patient self-scheduling tools to differentiate themselves competitively, improve efficiencies and enhance patient engagement and satisfaction.



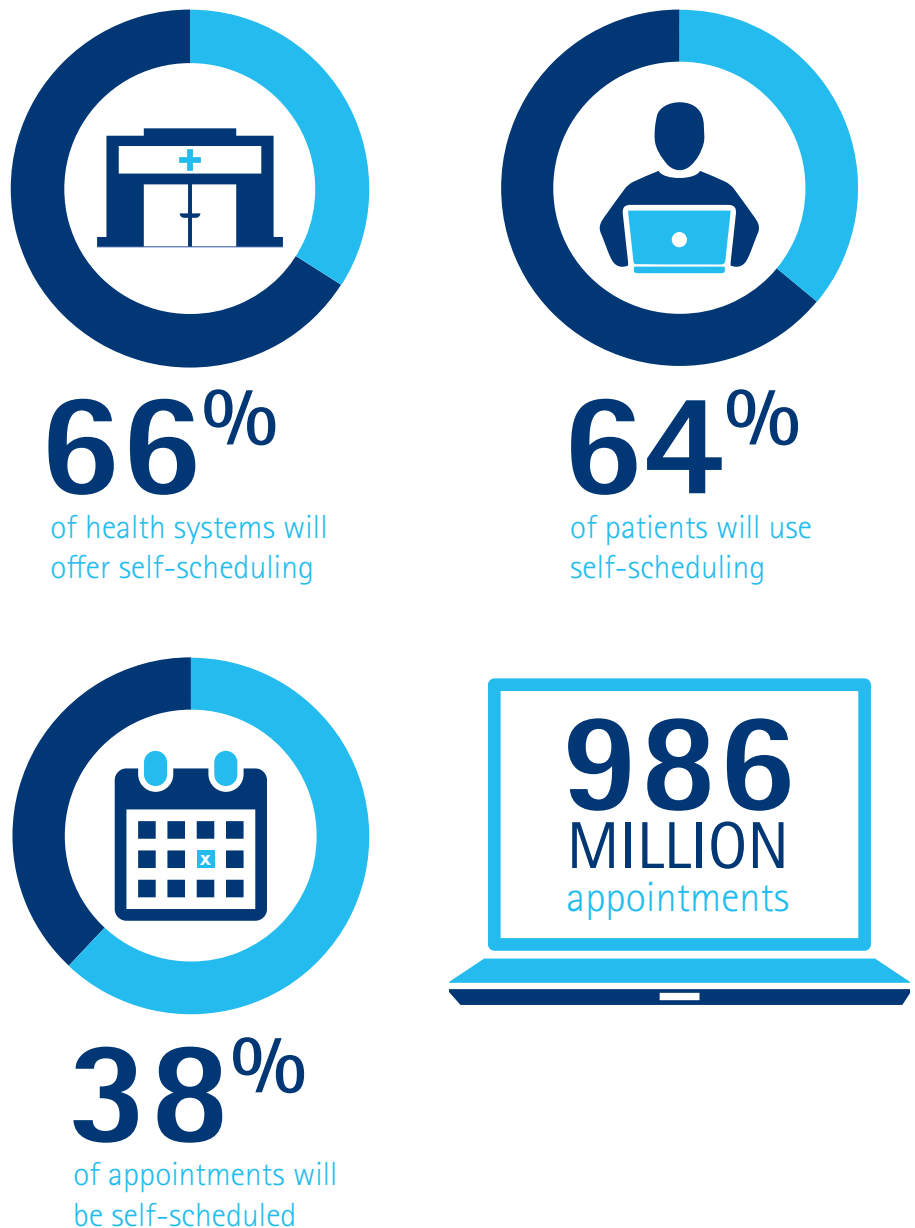
A recent Accenture survey shows 77 percent of patients think that the ability to book, change or cancel appointments online is important.¹ A rapid explosion in use of digital solutions for DIY appointment making will radically alter the US health system marketplace over the next five years. Accenture research predicts that by the end of 2019, 66 percent of US health systems will offer digital self-scheduling and 64 percent of patients will book appointments using digital tools. Nearly 38 percent of appointments will be self-scheduled—that's almost 986 million appointments—creating \$3.2 billion in value (Figure 1).²

The consequences for late adopters could be severe. Research shows that the average time for a patient to complete a scheduling call is 8.1 minutes and agents transfer patient calls 63 percent of the time—far exceeding national cross-industry best practices for call handling.³ Third party online self-scheduling services, which can enable patients to book appointments faster and get appointments sooner than by using the phone, position themselves between health systems and their patients and can drive patient volume to competitor systems.

Digital self-scheduling tools are better than the phone – and leading health systems are taking note

According to Accenture Health analysis, almost 40 percent of the top 100 US health systems and 10 percent of remaining US health systems currently offer the ability to digitally self-schedule some types of appointments. On average, a health system

Figure 1. Digital Patient Appointment Self-Scheduling 2019



Source: Accenture analysis 2014

that offers digital self-scheduling provides the ability to self-schedule half of its appointment volume. Nationwide today, patients self-schedule 2.4% of appointments out of the roughly 11 percent of appointments that can be self-scheduled. (Figure 2)

Over the next five years those numbers will spike dramatically. Accenture research predicts that by the end of 2019, all of the top 100 US health systems and 55 percent of the remaining health systems will offer digital self-scheduling. On average, a health system that offers self-scheduling will provide the ability to self-schedule 80 percent of its appointment volume. Across the US, nearly 38 percent of appointments will be self-scheduled, while almost 60 percent of appointments will be able to be self-scheduled. (Figure 2)

¹ Accenture 2013 Consumer Survey on Patient Engagement

² Scheduling of outpatient and ancillary appointments

³ Accenture Research, "Why First Impressions Matter," 2013

Digital self-scheduling offers efficiency, value and differentiation

Digital self-scheduling delivers significant financial and competitive benefits, helps maintain patient customer base, boosts operational efficiencies and improves organizational flexibility and agility. Adopting self-scheduling delivers value by enabling call center capacity to be reallocated and schedulers to perform additional and/or more complex activities. In 2019, 986 million appointments will be booked using self-scheduling tools, enabling health systems to reallocate \$3.2B in scheduler capacity that year alone, based on average annual scheduler salary and productivity. By making general appointment scheduling available online,

health systems can reduce excess capacity, expand scheduling hours and better allow for last minute appointments. The capability also provides healthcare transparency and patient control, both of which improve trust, loyalty and patient satisfaction.

As more health systems jump on the digital self-scheduling bandwagon, adopting improved scheduling options in the context of new models of care delivery, the sophistication of these tools will continue to increase. Digital self-scheduling tools will also allow patients to assess eligibility and financial liability. Armed with the patient's complete medical records, health systems will have the ability to provide a truly seamless patient experience on an end-to-end basis, from appointment through treatment to follow-up and payment and beyond. By expanding the patient

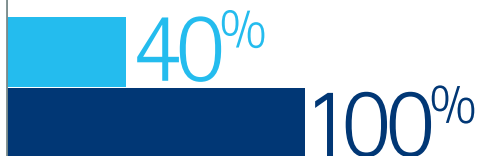
relationship online, providers can establish closer ties with patients that can ultimately improve their ongoing health and wellbeing.

Today, health systems are being financially squeezed, patient volume is decreasing and hospitals compete to attract and maintain patients in local markets and across the country. Health systems trailing in adoption of patient self-scheduling tools could experience market share erosion over the next five years, as competitors that offer convenient self-scheduling create a digital buzz among patients. While the penetration of self-scheduling tools will quickly reach market maturity, the impact of this digital disruption could last much longer. Consequently, the need to remain competitive in the health marketplace virtually mandates that health systems adopt self-scheduling as rapidly as possible.

Figure 2. Digital Patient Appointment Self-Scheduling 2014 and 2019 Market View

HEALTH SYSTEMS

Top 100 systems offering self-scheduling



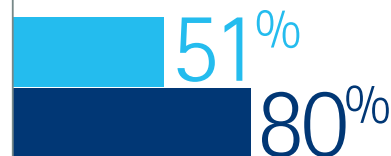
Other systems offering self-scheduling



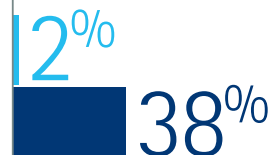
2014
2019

APPOINTMENTS

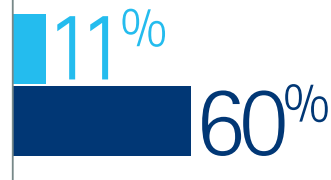
System appointment volume that can be self-scheduled



Appointments actually self-scheduled



Appointments that can be self-scheduled



For more information:

Dipak Patel

dipak.patel@accenture.com

Michael Brombach

michael.w.brombach@accenture.com

Methodology

Accenture surveyed the top US healthcare systems (by revenue) to assess digital self-scheduling capabilities. Accenture conducted analysis against data from industry associations and third party published reports to forecast appointment volume, schedule capacity and the impact of reallocating capacity and resources based on average scheduler salaries and productivity. Where appropriate, Accenture referred to data on appointment self-scheduling from the Accenture 2013 Consumer Survey on Patient Engagement.

About Accenture Insight Driven Health

Insight driven health is the foundation of more effective, efficient and affordable healthcare. That's why the world's leading healthcare providers and health plans choose Accenture for a wide range of insight driven health services that help them use knowledge in new ways—from the back office to the doctor's office. Our committed professionals combine real-world experience, business and clinical insights and innovative technologies to deliver the power of insight driven health. For more information, visit: www.accenture.com/insightdrivenhealth.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with more than 305,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US\$30.0 billion for the fiscal year ended Aug. 31, 2014. Its home page is www.accenture.com.

Copyright © 2014 Accenture
All rights reserved.

Accenture, its logo, and
High Performance Delivered
are trademarks of Accenture.

