

Starting from Scratch: How the Retail Clinic Industry Has Overcome Foundational Issues in Health Care

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The challenges facing the U.S. healthcare system have increasingly come into the public eye. At a high level, clinicians, politicians, patient advocates and payers are striving to improve the system. However, navigation of the diverse goals and priorities for each stakeholder group can cloud a vision of greater access, higher quality and lower costs. The role of the innovator is to generate and execute an idea that maintains a laser focus on its objectives in the face of the complexity and challenges inherent in the system it is designed to improve. The formation and expansion of the retail clinic industry can serve as a case study for innovators.

The retail clinic industry originated from a simple question: How do we create an exceptional healthcare experience for patients—an experience created directly for patients that focuses on individual patient needs? The healthcare system, as we know it, is complex and based on antiquated business models that focus on the treatment of illness as opposed to the promotion of

wellness. The number of primary care clinicians, particularly physicians, is limited. Patients are often left with little assistance to navigate a system that is expensive and opaque, and many are left without a transparent way to receive the care they need.

As a result, the question posed above could not be answered by conforming to the current system. The foundation for innovation was instead to start from scratch, with a clean slate. Step one was a comprehensive investigation of an ideal outcome, which gave little credence to existing barriers. This methodology allowed for an answer that was built to be a solution to the question and that in turn was disruptive to the status quo.

The investigation of the ideal healthcare experience started with research into the needs and wants of patients, but it was not limited to the healthcare industry. Industry founders looked to best practices in an array of fields:

- Businesses that created exceptional customer experiences did not greet their patrons with stacks of paperwork and rooms full of paper folders. So the retail clinic industry invested in electronic kiosks for patient registration, electronic medical records and e-prescribing systems.
- Best-in-class customer service organizations did not align their hours with the 9-to-5 workday. So the retail clinic industry offered night and weekend

access.

- Savvy consumers compare costs and services. So retail clinics took to enhancing transparency by posting prices for healthcare services and publishing peer-reviewed pieces on the quality of care offered in the setting.

These decisions and many others were made to create the strongest answer to the founding question of how to create an exceptional healthcare experience for patients.

Pushing aside the barriers and traditions of the status quo creates the best chance for strong solutions, but it also brings challenges. Stakeholders who are integrated and vested into traditional systems rightfully challenge new players and new ideas. The founding of the retail clinic industry was met with resistance from major insurers who expressed concern over the response of physicians in their networks. Clinical organizations questioned the qualifications of the providers who practiced in the model and the motivations of those who created it. The responsibility of innovators is to respond to critiques and questions and to showcase their commitment to the original goal.

Retail industry founders united through the formation of the Convenient Care Association and set standards for quality and safety as well as goals for collaboration with the healthcare community. They insisted on rigorous research into cost, quality and patient experience.

Analytical powerhouses such as Gallup, Deloitte and RAND Corporation carefully analyzed outcomes. Results from this research provided empirical evidence that retail clinics were creating a better healthcare experience for patients. Peer-reviewed publications showed that retail clinics offer a quality of care that is as good as or better than that offered in more traditional settings. Multiple published reports looked at retail clinics' performance against the Healthcare Effectiveness Data and Information Set (HEDIS), a tool used by more than 90 percent of America's health plans to measure performance on important dimensions of care and service, and each study showed exceptional adherence to evidence-based guidelines and standards of practice.

Analysis of costs showed significant savings relative to more traditional care settings. Some peer-reviewed publications noted the potential for billions of dollars of savings for the healthcare industry with greater utilization of retail clinics. Even when offering lower costs, retail clinics never lost the line of sight to creating a better patient experience. Gallup research with a retail clinic leader showed that customer engagement in the care setting was in the top 10 percent of all organizations that Gallup had measured—not just among healthcare providers but across all industries including luxury hotels, premium retailers and high-end auto dealerships.

As the body of evidence showcasing outcomes of retail clinics grew, new opportunities blossomed. Large health

systems as well as local practices expressed increased interest in partnerships to create better patient access. National and regional healthcare entities such as the Cleveland Clinic and Ochsner Health System joined forces with retail clinics to offer a better experience for their patients. Payers began including retail clinics in their networks and looked to create innovative ways to make their customers aware of the setting. With increasing acceptance from patients, clinicians and healthcare leaders, the industry was able to expand. More than 1,500 clinics have opened, and tens of millions of patients have utilized the setting.

However, the opportunity for innovation with retail clinics is still in its infancy. Clinic leaders are beginning to tackle chronic disease states such as hypertension and diabetes. Prevalence of chronic conditions in the United States is rapidly growing and overwhelming healthcare resources, driving up costs and destroying quality of life for patients and their families. Electronic medical record technology is in its early stages, and opportunities for improved integration and coordination of care abound. The retail clinic model itself can continually be evaluated for opportunities to drive improvements in efficiency, experience and healthcare outcomes.

Innovators must continually challenge themselves and the systems they operate in and around. Evolutions, compromises, expansions and new ideas must also be measured against the founding question and mission.

There will need to be a continued focus on the mission of greater access to high-quality, affordable health care. Retail clinics cannot be limited by the barriers of the status quo—either within the industry or outside of it. They must continue to re-evaluate and optimize solutions while promoting collaboration and partnerships with innovative healthcare leaders and systems.

New strategies for delivering care will have to continue to be evaluated, and expansion of scope of services to help prevent, treat and manage chronic diseases, one of the greatest burdens on the healthcare system today, will need to be addressed. Continued focus on utilization and optimizing healthcare technology will ultimately lead to higher quality of care, improved patient outcomes and enhanced patient safety. Clinics will need to utilize all professionals to the highest level of their education and training, with a focus on growing healthcare expertise in the fields of nursing and medicine, to meet the needs of Americans.

Most importantly, we cannot ignore our focus on the patient. We must empower our patients and realize that healthcare is a complicated team sport that takes an integrated system with everyone working together to create the strongest outcomes.

The future for the retail industry is bright and, when barriers are broken, innovators must demonstrate the results of their efforts and then strive to improve again—

always working to answer the question and to create the solution, never compromising or settling for the status quo.

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