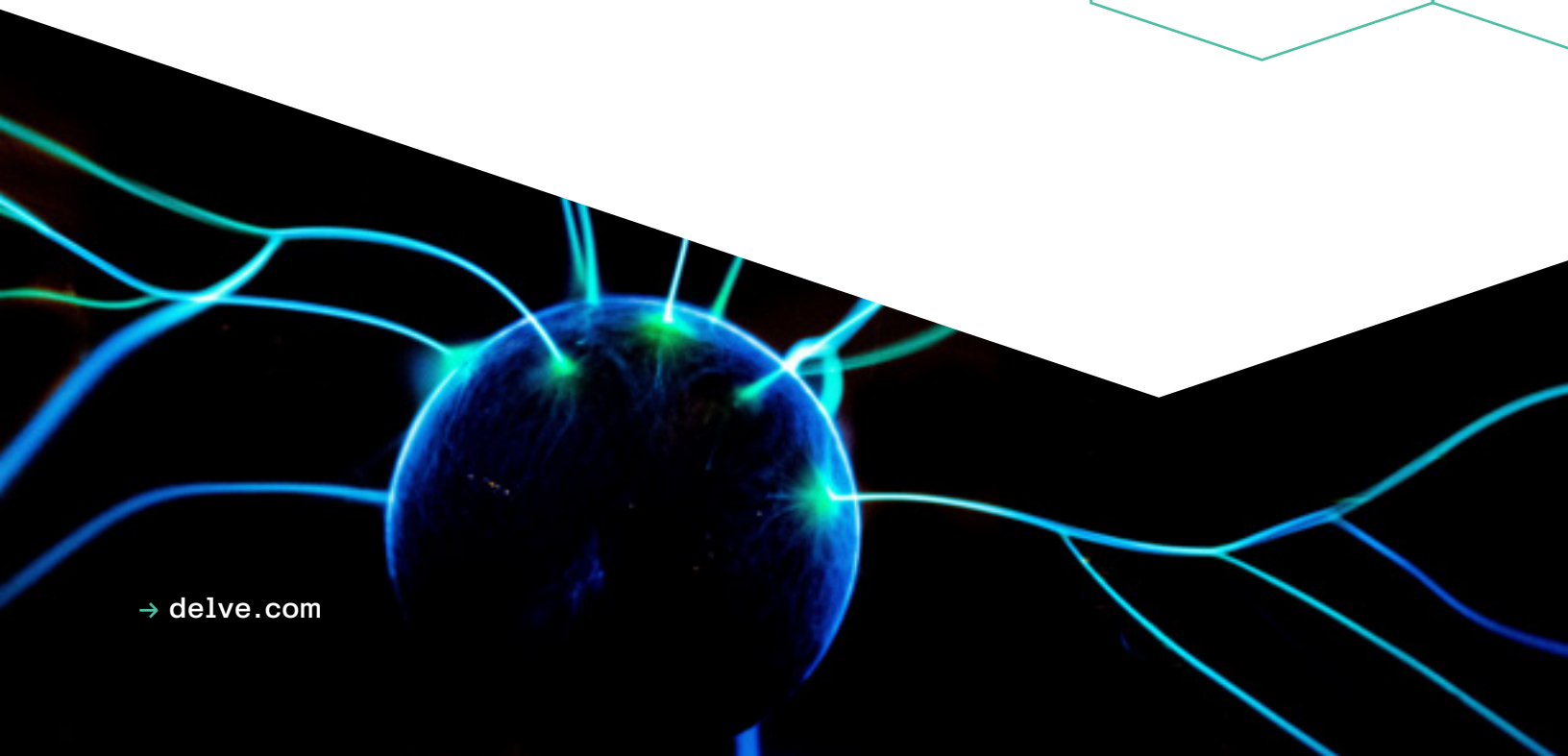
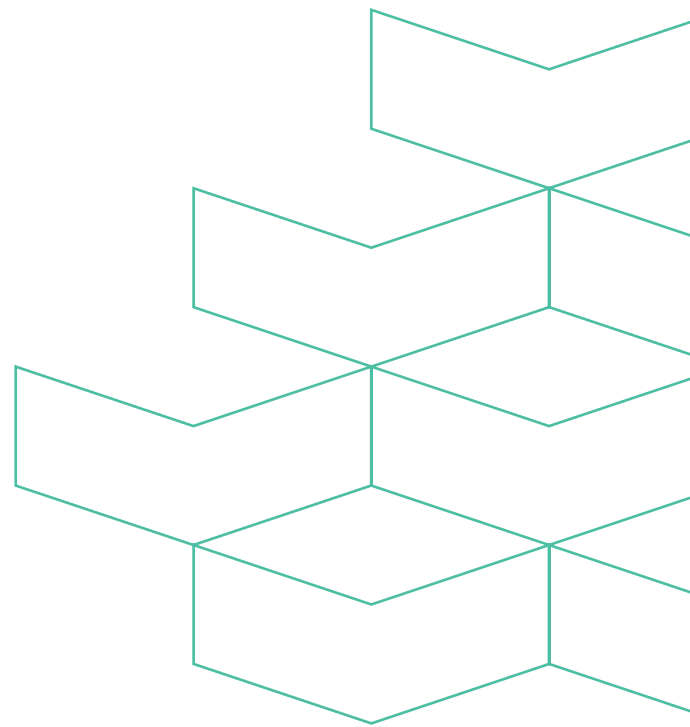




**Delve**

# How to Design Health Products of the Future

Five strategies for  
envisioning healthcare  
through 2030





Imagination is more important than knowledge. For knowledge is limited, whereas imagination embraces the entire world, stimulating progress, giving birth to evolution. It is, strictly speaking, a real factor in scientific research.

*Albert Einstein*

## At a glance

The increase in chronic diseases and the rise of healthcare costs have spurred legislators, payers, and providers to rethink the sustainability of our healthcare system. Concurrently, consumers expect the same ease of use, convenience, transparency, and choice from healthcare that they now receive from other industries. **We think consumer needs will drive the revamp of the healthcare system**—and evidence of that has already appeared in the marketplace.

At Delve, our **consumer megatrend framework** places sociocultural trends in the context of industry and technological trends to envision consumer needs long-term. It is deeply rooted in broader social, economic, and political landscapes, and therefore is a surprisingly stable set of drivers. While these forces change only slowly over time, the ways in which megatrends link up into plausible scenarios of the future is not as clear-cut. It is an art that requires industry expertise, lateral thinking, and a bit of imagination.

In this paper, we use this framework to explain **five leading strategies** that can help companies develop healthcare innovations that will fit consumer and provider needs now, and into the future. We also share our predictions about how these strategies may evolve by 2030, and invite you to ask: how can we prepare for these future scenarios?





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# The Power of Creating Scenarios of the Future

You might already know which features you're adding to the next iteration of your medical product. Perhaps it's wireless connectivity and electronic medical record integration. Or a simpler UI interface and training program that allows for more professionals to handle it without errors. You've invested in usability testing and ethnographic research in hospitals, clinics, and homes in order to map the product's current pain points, and to eliminate them in version 2.0.

Now suppose you included steps to generate scenarios of the future as part of your product development process. What if your team considered how the medical challenge you are solving for might change, or even disappear over the next ten years — because of artificial intelligence, nanobots, gene therapy, or a smart watch? What would make your product absolutely vital in that environment, independent from current constraints and assumptions?

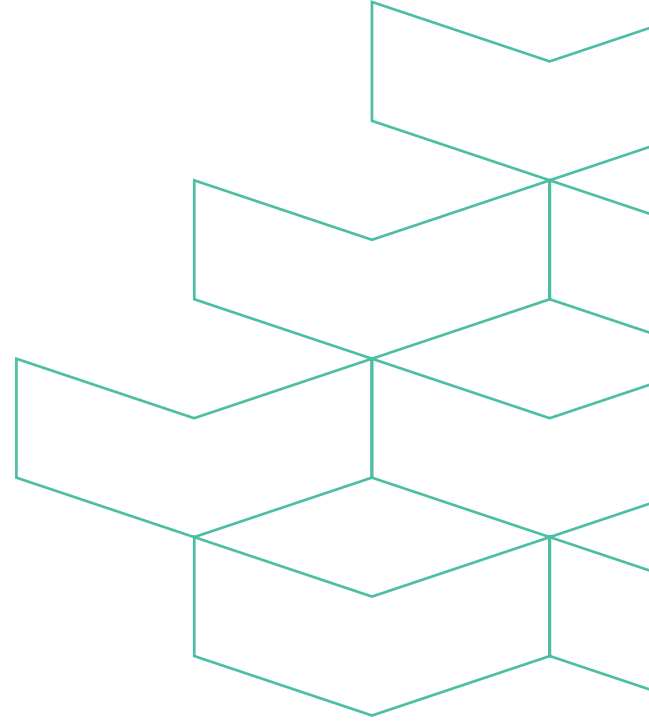
What is the ideal way a patient might achieve their health and well-being goals in 2030, and what would be the ideal version of your product in that scenario?

## How would incorporating a vision of the future into your design process affect what version 2.0 even is?

Future visions do not need to be science fiction. A strategic vision incorporates consumer and industry trends, macro-external factors, and the understanding that today's futuristic technologies will be tomorrow's everyday technologies.

When you create the vision of your future user's world and your place within it, you're charting a directive for teams to work toward.

In this paper, we highlight the industry trends that have accelerated the need for this kind of visionary innovation. We list and explain five strategies to develop health and wellness products of the future, along with our story about how these strategies—taken to their logical end—might produce different (but very likely) healthcare experiences than the ones we recognize today.





**100%**

Increase in mental health claims from 2007–2017

# Q: What's Making Healthcare So Vulnerable to Disruption?

Three major catalysts—each its own mix of economic, demographic, social, and technological factors—are driving the rapid changes that are happening throughout our healthcare system.

## a. The healthcare system is struggling to cope with the cost of the unprecedented surge of healthcare needs.

The American healthcare system has been described as fragmented, inefficient, and opaque. The epic rise of chronic disease has made these shortcomings even more glaring. While 60 percent of Americans are currently living with at least one chronic disease, 40 percent have been diagnosed with two or more. One out of three American adults is obese, while the percentage of children and adolescents affected by obesity has more than tripled since the 1970s.

The highest risk factors are behavioral, not genetic: lack of exercise or physical activity, poor nutrition, tobacco use, and excessive alcohol consumption. Studies show that even small reductions in these four high-risk behaviors could prevent or delay up to forty million cases of chronic illness per year.

Mental health claims have also increased over 100 percent during the past decade, while diagnosis increases for young people were particularly staggering: among the high school and college-age population, anxiety rose approximately 400 percent.

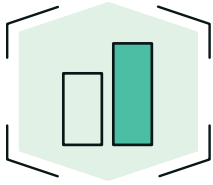
These diseases are incredibly costly. Nearly 85 percent of the nation's annual healthcare costs went toward treating chronic and mental health conditions. These costs will be exacerbated by our aging population, who have higher health needs—by 2030, one in five people will be over age 65. Coupled with the fact that 18 percent to 37 percent of total healthcare spending is considered inefficient—which includes inflated prices, low-value care, poor care coordination, and administrative complexity—the sustainability of the current model is in question.





**60%**

Americans currently living with at least one chronic disease



**24% to 34%**

Growth in healthcare payments tied to value-based care from 2015–2017

## b. Value-based care is changing the rules of the game.

Value-based care is a healthcare delivery model in which providers, including hospitals and physicians, are paid based on patient health outcomes, rather than the amount of healthcare services they deliver. The “value” is derived from measuring how efficiently positive results can be delivered.

Under value-based care agreements, providers are rewarded for helping patients improve their health, reduce the effects and incidence of chronic disease, and live healthier lives in an evidence-based way. This ultimately changes the way physicians and hospitals provide care, which stresses a team-oriented approach and sharing patient data so that care is coordinated and outcomes can be easily measured.

Since 2013, there has been a seven-fold growth in the number of states and territories implementing value-based reimbursement programs—with a total of forty-eight now participating.

## c. The consumerization of health means a lower barrier of entry to new entrants and disruptions.

Healthcare products are no longer made just by healthcare companies. Big Tech — Amazon, Google, and Apple — have already entered the game, as well as other companies in various consumer-facing industries.

Startups have also proliferated with nimble products. Understanding that consumers spend 99.9 percent of their time managing chronic diseases outside of the doctor’s office, these new players have also started to expand their management offerings to prediabetes, hypertension, high cholesterol, and obesity. Digital diabetes management startups such as One Drop, Omada Health, and Livongo have IoT blood glucose monitors and connected smart phone apps that offer personal coaching, activity and glucose tracking, and personalized behavioral “nudges” based on past actions.

Most insurance companies offer coverage for such programs, as they have proven their worth as value-based solutions – which not only leads to cost-savings, but also to reduced related health risks, including cardio and vascular disease.

**Put together, these three catalysts create an increasingly competitive healthcare industry where incumbents are finding their traditional strengths weakened; new entrants from a diverse set of industries are disrupting the market; and healthcare consumers are becoming more influential than ever.**

**Innovation is vital to sustaining a competitive edge in this new healthcare industry.**



# Five Strategies to Design Health & Wellness Products of the Future



Based on insights from industry reports, academic publication, market data, trend-spotting platforms, and our own internal Delve Megatrend Framework, we've developed five key strategies for companies looking to future-proof their process. These strategies will help you envision the future of healthcare through 2030.





# 1 Everyday Wellness

Redefine Healthcare  
As Preventive & Proactive



**Our perception of health and wellness changes as society evolves.** We foresee a growing focus on health and wellness as a part of our everyday lives that will only pick up as we move through the coming decade. Companies that can extend their offerings across the entire wellness journey will gain from this shift toward everyday wellness.





CURRENT PARADIGM  
**Focused on Illness**

- Reactive
- Eliminate illness
- Biomedical
- Disease-oriented
- Physician = expert
- Patient



NEW PARADIGM  
**Health & Wellness**

- Proactive
- Enhance wellness
- Physical, social, mental, emotional
- Lifestyle-oriented
- Network of experts
- Healthcare consumer

### WHAT'S CHANGED?

In the current paradigm, clinical healthcare is episodic and reactionary, focused primarily on biomedical issues—even when 88 percent of physicians think their patients' concerns are influenced by social and environmental factors. The patient is a more passive recipient of healthcare and trusts the physician's authority.

Future healthcare products, however, need to embody a proactive and preventive mindset. This new paradigm is focused on enhancing our well-being and health in all areas of our life all of the time, whether we're tracking our steps, biometrics, or minutes meditating. In a recent consumer survey, mental well-being and "feeling good" were the two highest qualities consumers associated with "being healthy" – and that was more so than the absence of disease. As healthcare consumers, we want more choices in fulfilling our health goals and want more knowledge over those choices.

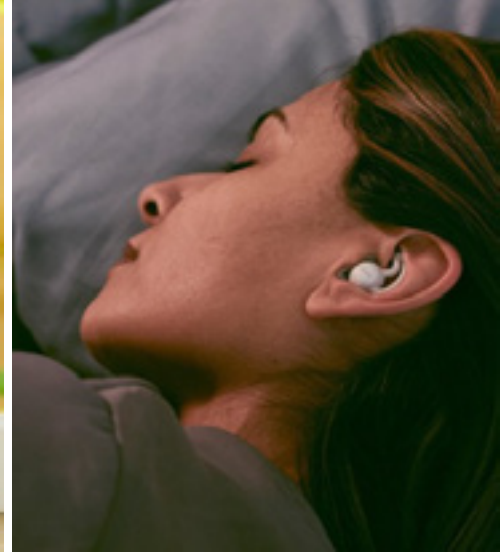
**This new paradigm is focused on enhancing our health and well-being in all areas of our life all of the time.**

It's no surprise that consumer companies are leveraging this strategy to challenge incumbents and enter healthcare. One new market that the wellness strategy has created is sleeptech, a category that barely existed five years ago and is now on track to hit \$101.9 billion by 2023.





**Urgonight - EEG Band**  
Brings sleep-clinic science  
into the home



**BOSE – Sleepbuds To Mask  
Noise** Soothing sounds  
to stay asleep

## EXAMPLES OF THE NEW PARADIGM

**The Urgonight EEG Band** is backed by URGO Group, a leading French international healthcare group that specializes in self-care and advanced wound care. Based on neurofeedback, the device teaches you brain-controlled exercises that can help you produce brainwaves that enhance natural sleep, with just wearing it twenty minutes a day, three times a week.

The popularity of the device, whose premise is to bring sleep clinic technology to the general public, indicates that consumers are ready to do what it takes to enhance sleep outside of sleep hours. This device won the CES 2019 innovation award in the wearables category.

**Bose noise-masking sleepbuds** are a consumer device with health benefits. As you might have expected, a company known for its premium noise-cancelling headphones has used the same expertise to mask unwanted noises during sleep. While the Urgonight EEG Band brought research- grade medical technology to health-conscious consumers, Bose delivered consumer tech to the same market.

photos: Urgonight, Bose



## A Scenario of the Future: Health + Wellness in 2030



By 2030, the shift from a patient-centric system to a consumer-led health and wellness industry is complete. An increase of competition and choice from new entrants has led to a decrease in price and the democratization of care. As healthcare starts to deliver service options with transparent prices, consumers are empowered to design their care to fit their needs, values, identity, and goals.

An empowered “super healthy” individual is able to craft his health and wellness program in his high-tech home. A voice-enabled smart mirror conducts a visual skin assessment, while the countertop checks his heart rate, temperature, and other biometrics. The mirror display has synced with his listed health goals, calendar, and goals, in order to develop a diet and activities plan for the day.

### YOUR OPPORTUNITIES

1. **Extend engagement to the entire wellness journey.** How can your company’s strengths be used in wellness, prevention, and management – not just diagnosis and treatment?
2. **Meet healthcare consumers where they are.** As companies extend their engagement, companies will meet healthcare consumers they are not familiar with, and in contexts they may not have experienced before. It is important to start building new connections with these consumers, whether directly, or indirectly with new partners.
3. **Partner with unconventional stakeholders.** Seek out partnerships in other industries that have opportunities in wellness—which in the consumer market can be just about anyone. Think about fashion (wearables), entertainment (behavioral gamification), meal delivery (nutrition), or even furniture (health at home). They want to partner with you just as much as you want to partner with them.

### POTENTIAL PITFALLS

4. **Failure to Integrate:** The consumer does not need more siloed solutions. As companies move towards wellness, they need to ensure their offerings work with both existing and emerging healthcare solutions.
5. **Failure of Design:** The features and functions of a wellness device do not correspond to a medical product. Are you still designing wellness product with a medical mind-set? Even for medical products, patients are increasingly expecting them to deliver consumer level benefits.



## 2 Empathic Care

Cultivate Empathy Through Relationships, Services, & Spaces



As the role of the patients evolves into one of healthcare consumers, companies need to deliver an empathic care experience beyond better usability. Companies that provide more meaningful connection at an emotional and aspirational level will attract the next generation of healthcare consumers.



CURRENT PARADIGM

**Dispassionate Care**

- Healing measured by numbers
- One-size-fits-all patient journeys
- Treatment regimens that demand perfection from patients
- Physician = expert

NEW PARADIGM

**Empathic Care**

- Healing measured by ability to function and achieve meaningful goals
- Personalized healing journeys
- Treatment plans that are flexible and provide support
- Physician + patient + caregivers = partners in care

**WHAT'S CHANGED?**

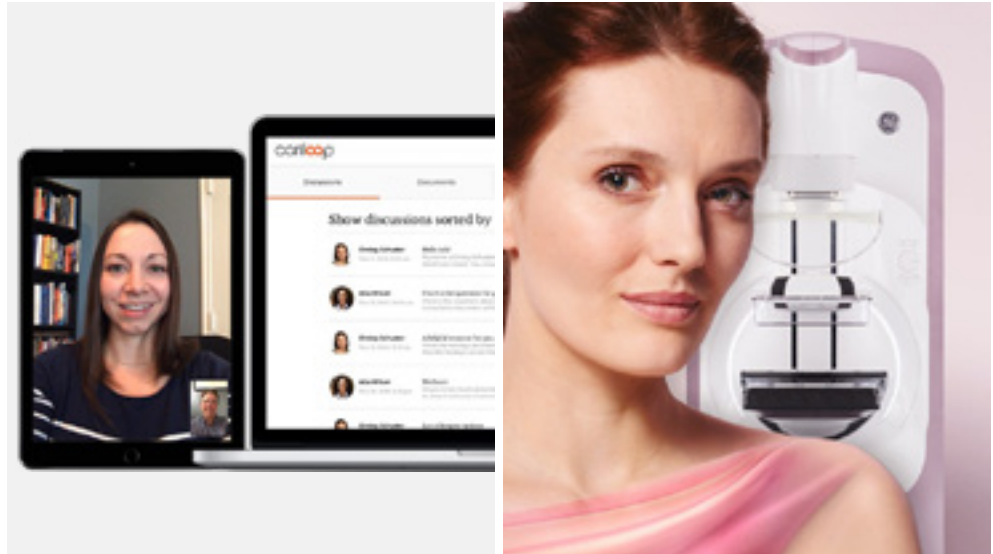
We've all experienced a quantitative approach to healing that has treated us like a number and neglected to take our life circumstances or preferences into consideration. Empathic care, however, is about achieving meaningful and functional goals that enable us to live life the way we want to.

This type of treatment plan takes your social and environmental context into account, and understands that you, your physician, wellness professionals, and caregiver or family are all equal members of the team needed to help you return to your optimal state.

Numerous studies have shown that empathic care leads to better patient outcomes, compliance, and satisfaction. While this may seem passé—or even contradictory to the rise of digital health—we think empathic products will edge out their competitors

Empathic care is about achieving meaningful and functional goals that enable us to live life the way we want to.





**Cariloop - Caregiver Support Platform**  
Helps families manage their caregiving journey

**GE - Senographe Pristina Mammography System**, A new approach to the breast exam experience

## EXAMPLES OF THE NEW PARADIGM

Caregivers have been traditionally marginalized in healthcare, even though more than forty million caregivers in the United States have provided unpaid care to an adult or child in the last twelve months. The **Cariloop Caregiver Support Platform** helps families communicate and store important health, financial, and legal documents while having ondemand access to a dedicated healthcare coaches who guides the families through the many decisions they make over the length of their caregiving journey. The rise in elderly populations and the growing demand for methods that will help aged people live a more productive life will ensure health caregiving remains a dynamic market.

What if medical machines were designed to take into account a patient's emotional experience? The **GE Senographe Pristina Mammography System** is the result, which features a range of ergonomic features that are intentionally designed to lessen patients' anxiety and enable comfort. Rather than compress the breast automatically, the patient can set compression to a level that feels right for them under the direction of a technician. Sharing this power of control with the patient helps to ease their feelings of pain and anxiety.

photos: Cariloop, GE



## A Scenario of the Future: Empathic Care in 2030



The physician-patient relationship has been replaced by the care team-healthcare consumer relationship. Physicians have become akin to data scientists or esteemed chefs — their “back of the house” role is dedicated to medical and technical expertise, while new professionals handle “bedside manner.”

The newly robust care team includes care service personnel, digital health assistants, nutritionists, mental health professionals, and health coaches who primarily manage the consumer’s daily emotional, social, and wellness needs. This consumer-model assumes an empowered patient who is an equal partner with the care team.

The medical office looks like a spa, to be as inviting and calm as possible. An oncologist has studied the patient’s biopsy and other

data to develop a myriad of treatment options that might suit the patient’s values and needs. Care service personnel explain the cancer diagnosis using VR and lucidate how different treatment approaches will affect their day-to-day lives. The patient can “ping” the oncologist on a remote network, but they are more likely to get in touch with a care coordinator to help ensure that the patient maintains quality of life during the treatment.

### YOUR OPPORTUNITIES

1. **Design for a more dignified experience.** Consumers will not want to use products that chip at their feelings of self-worth. To ensure treatment adherence, the product or experience has the responsibility to facilitate support during the healing journey.
2. **Use tech to enable emotional experiences, not replace them.** AI, data analytics and automation are here to stay. How can you use these processes to meet patients’ emotional needs? How might they free up provider time to enable connection?
3. **Tap into the power of community.** By providing a space for peer communities to form, your engagement with the consumer will extend beyond product features. Strong social connections builds brand loyalty.

### POTENTIAL PITFALLS

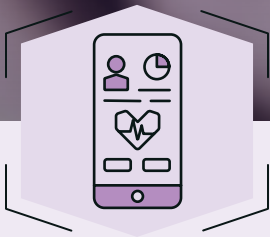
4. **Failure of authenticity.** Are you just using buzzwords instead of acting on them? If so, consumers know, and will call you out. It is extremely important to practice what you preach, as failure to meet raised expectations provokes ill will.



# 3

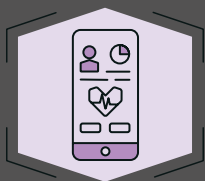
## Data-Informed Personalization

Utilize Data to Provide the Right Care for the Right Person



**Advancements in AI and data analytics technologies, and the healthcare consumer’s increasing interest in tracking and sharing personal data, are paving the way for highly personalized care.** To win this race, companies need to deliver deeper, more meaningful personalization.





CURRENT PARADIGM  
**Generic Treatment**

- Informed by population averages
- Unstructured data
- Trial-and-error
- Reactive



NEW PARADIGM  
**Data-Informed Personalization**

- Informed by DNA, biometrics, or preferences
- Smart and interoperable data
- Continuous iteration
- Predictive and preventative

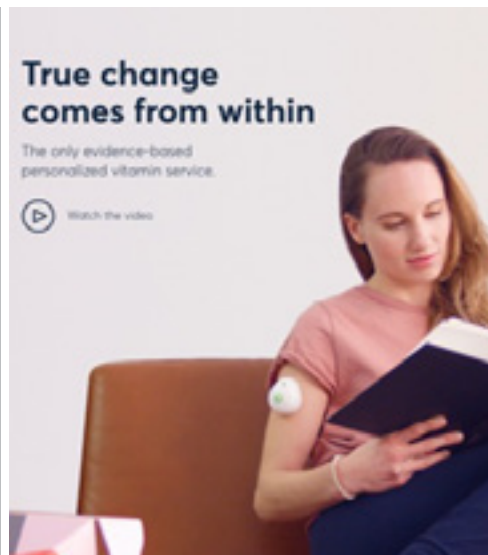
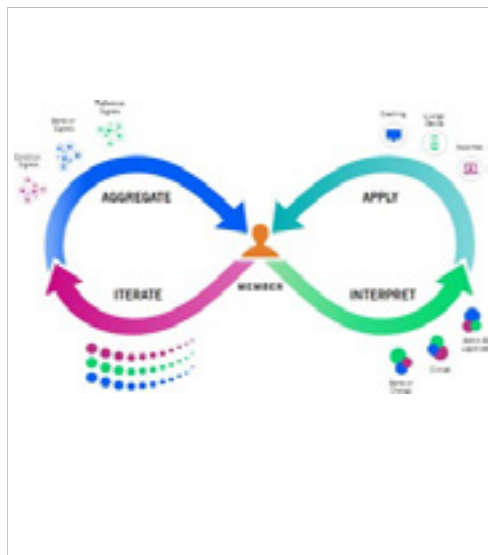
### WHAT'S CHANGED?

Physicians have traditionally worked with an incredibly shallow amount of data when creating a patient's treatment plan: they might have access to a few test results and basic biometrics. It is no surprise then that treatment is a process of trial-and-error, subject to procedures or prescription drugs that were developed to treat population averages.

New products or services, however, aggregate personal and big data – including genomics, preference and lifestyle data, and even social determinant factors, to create tailored solutions. This continuous stream of data can create iterative treatments that are optimized to be given at the right time to be most effective.

**New products or services aggregate personal and big data – including DNA, preference and lifestyle data – and even social determinant factors, to create tailored solutions.**





**Livongo**  
An “applied health signals” company

**Baze**  
Customizable vitamin pack & home blood test kit

## EXAMPLES OF THE NEW PARADIGM

**Livongo** is a chronic disease management platform that calls itself an “applied health signals” company that uses an “AI+AI” formula: Aggregate, Interpret, Apply, and Iterate. Livongo joins dozens of data sets together and combines them with signals from proprietary devices, health coaches, and web assets in order to understand what drives the unique user’s behavioral change. The platform then delivers actionable, personalized and timely recommendations to assist the user in managing their chronic disease.

**Baze** is a Berlin-based startup that offers personalized vitamins as a subscription. The company sends an at-home blood sampling kit to test current nutrient levels, and develops personalized vitamins based on individual deficiencies and needs. Quarterly blood tests then track improvements.

photos: Livongo, Baze



## A Scenario of the Future: Data-Informed Personalization in 2030



In 2030, medicine is smart, having evolved from precise to predictive and responsive. Real-time data inputs come from your genome, microbiome, physical activity, emotional state, and environment, and play the primary role in informing your end- to-end health and wellness plan. This may include lifestyle, diet, treatments, as well as preferred enhancements. Your personalized insurance plan takes all of these factors into account.

There is no need to individually track your metrics, and figure out how to make sense of them or what actions you should take in response: An AI network continually collects a range of data inputs from wearables (including smart clothing), the environment, and social and governmental sources. Built with behavioral psychology in mind, the AI network transforms this array of inputs into

a daily wellness regimen that adapts to the individual's needs and preferences. This data is also used to develop personalized treatments, predict adverse events, and ensure optimal timing of interventions.

### YOUR OPPORTUNITIES

1. **Personalization is about emotional connection, not just efficacy.** In order to deliver a truly personalized solution, you will need to engage the user beyond the aggregation of data—and speak to their preferences and emotional needs. Better yet, engage the consumer to take an active part in the personalization process.
2. **Build intelligence and influence across the ecosystem.** Traditionally, medical device companies have not had the opportunity to leverage data like other stakeholders, primarily payers and providers. As IoT proliferates, you will create and gain access to more data, both within and outside the healthcare domain. Companies can extend their influence and value through this exchange.

### POTENTIAL PITFALLS

3. **Failure to Provide Control:** Security and privacy are a requirement for entry. Consumers are more willing than ever to share their personal data, however, they also demand more transparency and control on what is being done with their data and why.
4. **Failure to Iterate.** Collecting data without making it meaningful is not personalization—it's just noise. Do not collect more than necessary, and design personalized feature that truly fulfill people's needs.



# 4 Anytime, Anywhere

Reimagine Where, When, and How Quickly Care Can Take Place



**As technologies continue to advance, care will continue to be delivered faster, in unexpected places, and at previously untenable times of day and night.** Coupled with growing expectations from healthcare consumers, companies that can redefine convenience will gain a competitive edge.



CURRENT PARADIGM  
**By Appointment Only**

- Set and traditional locations
- Face-to-face
- Expertise trumps convenience
- Provider-centric



NEW PARADIGM  
**Anytime, Anywhere**

- Location-agnostic or unconventional locations
- Mixed-channel engagement (virtual + physical)
- Convenience is paramount
- Consumer-centric

### WHAT'S CHANGED?

When the health system is provider-centric, it's also incredibly inefficient: care takes place in limited locations—a doctor's office or hospital—and it may take weeks to get an appointment just to see a physician for fifteen minutes.

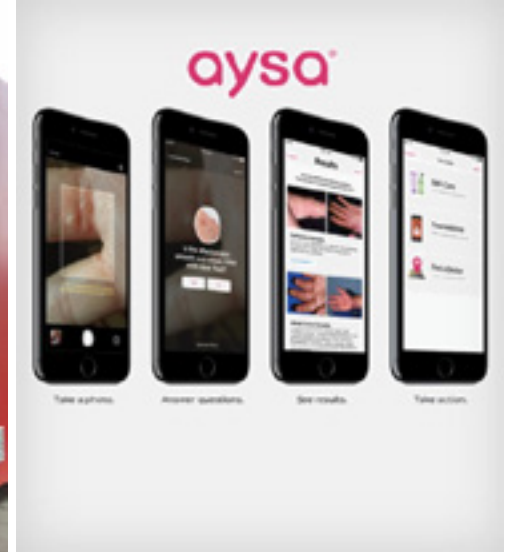
In consumer-centric health, convenience determines the time and location of care. Just as Amazon has made purchasing anything an "anytime, anywhere" proposition, new entrants have popularized telehealth, minute clinics, and health apps to ensure users get the healthcare they want, when and where they want it.

**In consumer-centric health, convenience determines the time and location of care. Users get the healthcare they want, when and where they want it.**





**Ping An Good Doctor**  
Unstaffed, 24 hour medical clinics  
across China



**Aysa**  
Healthcare by phone

## EXAMPLES OF THE NEW PARADIGM

**Ping An Good Doctor** is a healthcare platform of unstaffed “one-minute clinics” housed within phone booth-like structures, where an AI doctor sets up a diagnosis plan which is sent to a real doctor via telemedicine. Patients can then get their prescriptions filled by the Smart Medicine Cabinet, which stocks over a hundred medications; medicines not in stock can be purchased through the Ping An app and delivered in an hour. There are a thousand in place now, serving more than three million people.

**Aysa** is the first consumer-facing app from Visual Dx, the healthcare informatics company that houses the largest medical image library in the world. Through machine-learning, Aysa can analyze a photo of dermatological concerns to provide personalized guidance and helpful information.

photos: Ping An Good Doctor, Aysa



## A Scenario of the Future: Anytime, Anywhere in 2030



Just as data tracking has been integrated into our bodies, sensors are embedded in our homes and public spaces to generate data anytime, anywhere. In 2030, outpatient care is conducted in ubiquitous units spaced throughout the city, while acute care is highly mobile and robot-assisted. The hospital is a much smaller, extremely specialized center that is reserved only for the most complicated of cases.

A resident is able to order drone-delivered prescription drugs or diagnose a sore throat from a mobile kiosk on a city street. In addition to exercise equipment, the local gym has an in-house MRI machine for body composition analysis and an IV infusion menu. Emergency rooms have evolved from stationary rooms inside hospitals to mobile vehicles.

### YOUR OPPORTUNITIES

1. **Reimagine the function of traditional institutions and stakeholders:** Companies can prepare themselves for a healthcare system with no physical address. As a result, the role of the hospital and physician will necessarily change. Challenge the assumptions of when, where, and how quickly benefits can be delivered (and by whom).
2. **Cater for non-expert use.** Procedures that only physicians can do today might be done by consumers at home in the future. Design your solution so that both healthcare providers and consumers can use it conveniently.

### POTENTIAL PITFALLS

3. **Failure to provide a desirable level of clinical care.** While convenience will bring consumers to your product or service, delivering the right level of care with high level of consistency will keep them there.
4. **Failure to remember the needs of the healthcare provider.** As we move towards anytime anywhere care, the healthcare provider remains a critical stakeholder. Don't forget their needs in the new forms of care delivery.



5

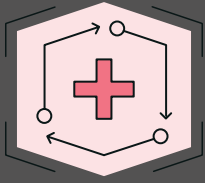
## Seamless Integration

Deliver An Integrated Experience Across The New Health Ecosystem



As healthcare moves toward everyday wellness, new health and wellness solutions will consist of offerings you wouldn't expect from the **current ecosystem**. In the meantime, solutions that provide a seamless integration of diverse services will entice healthcare consumers looking to skip the hassle of managing multiple platforms. Healthcare solutions can no longer work in silos.





CURRENT PARADIGM

**Scattered Silos**

- Single product-centric
- Captures either diagnosis or treatment
- Single point of engagement
- Does not translate data into value
- Physician = expert



NEW PARADIGM

**Seamless Integration**

- Platform of devices and experiences within an ecosystem
- Captures prevention, diagnosis, treatment and management
- Multiple points of engagement
- Physical/digital integration synthesizes data

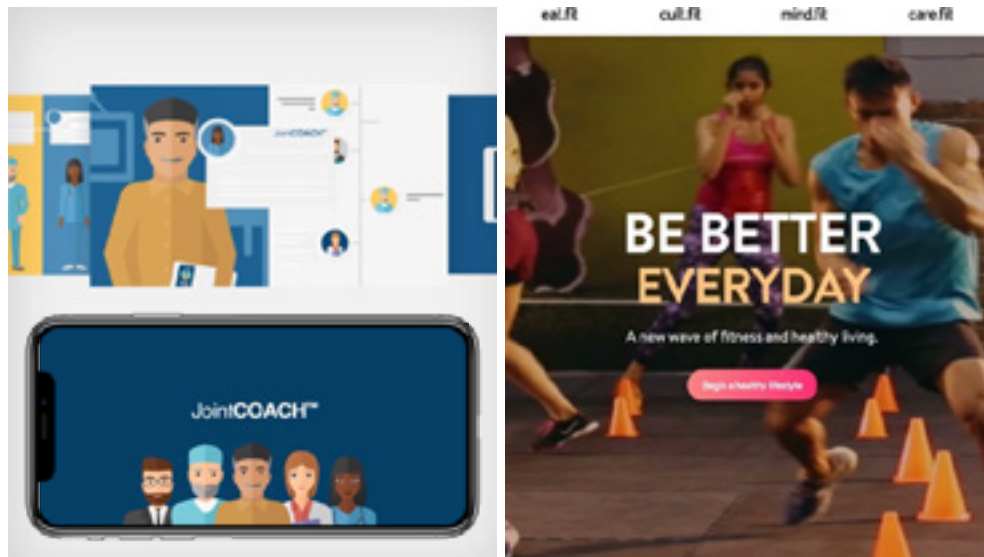
**WHAT'S CHANGED?**

Imagine a Fitbit without smartphone or app integration. The focus on a singular product – and its functions and features – without considering the role it plays within the larger patient or provider journey leaves it in a vulnerable position. If a tool is disconnected from other solutions, tools, or platforms, the likelihood is that it is missing major opportunities to improve patient care.

Seamless integration takes into account the entire patient experience including biological, social, and environmental determinants. It fuses physical and digital interfaces, considers quantitative and qualitative data, and moves easily between prevention and management—not unlike the digital diabetes management systems mentioned on page 6. The consumer desires a single trusted solution, rather than toggling between multiple products and companies. Seamless integration represents the appropriate design and technological tools for delivery, and enables the previous strategies.

**The consumer desires a single trusted solution, rather than toggling between multiple products and companies.**





**Stryker JointCOACH & RecoveryCOACH**  
Online care for procedure surgery and recovery

**Cure.Fit**  
Omnichannel wellness solution

## EXAMPLES OF THE NEW PARADIGM

**Stryker Coach** is a digital patient engagement and education platform to help improve care delivery for patients undergoing joint replacement surgery. Stryker is a medical device company that makes implant joints. The platform includes pre-op preparation, clinical protocols, information about medications and pain control, and rehabilitation activities that are delivered with a series of questionnaires and surveys to help insure patients are experiencing a successful recovery. Notice that Stryker took a product focused on treatment, and extended its reach into management.

**Cure.Fit** is an India-based, omnichannel startup operating within the wellness space. It provides services across three verticals: Cult.fit, its brick- and-mortar fitness centers; Eat.fit, a healthy meal delivery subscription; and Mind.fit, an app-based mental wellness program. April 2018 saw the launch of Care.fit in Bangalore, a primary healthcare center focusing on prescribing long-term healthy lifestyle solutions. Centers have also expanded to the UAE.

photos: Stryker, Cure.Fit



## A Scenario of the Future: Seamless Integration in 2030



Seamless integration within the patient healthcare journey is no longer a differentiator – in 2030, the most advanced systems have integrated molecular information, with individual behaviors (food, exercise, mental state) and macro factors (population, social, environmental) to deliver enhanced individual, societal, and global health plans.

The city has become completely “smart”—integrating environmental, social, transport, demographic and economic data that helps policy become as iterative as software. More health spaces, parks, climate-stabilizing activities and an equitable distribution of resources, have led to an increased quality of life. Healthcare is no longer disconnected from social determinants of health— poverty, environment, social networks—and providers prioritize their advancement on par with scientific research.

### YOUR OPPORTUNITIES

1. **Establish an ecosystem or play a part within one.** How is your product part of a broader service? Can you build an ecosystem that delivers an integrated solution? If not how can you connect your solution to an existing ecosystem?
2. **Bridge the gap between health and wellness:** As healthcare decentralizes, ensuring consistency between different point of engagement becomes more important. The seamless transfer of data, user experience and relationships will be critical.

### POTENTIAL PITFALLS

3. **Failure to be user-centric.** Are you building your ecosystem based on what you are most familiar with, or based on what the consumer really needs?
4. **Failure to consider the influence of the tech giants.** Apple, Amazon, Microsoft, IBM, Google, and even Facebook are making waves in healthcare. These tech companies have the advantage of already being a part of consumers' lives. Think about how you can connect to their network.



# A Framework for Visionary Information

WHY

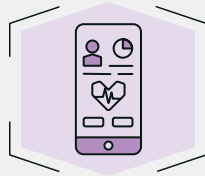


**Everyday Wellness:**  
Redefine Healthcare as  
Preventive & Proactive

WHAT



**Empathetic Care:**  
Cultivate Empathy  
Through Relationships,  
Services, & Spaces

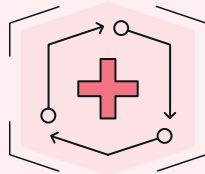


**Data-Informed  
Personalization:**  
Utilize Data to Provide  
the Right Care for the  
Right Person



**Anytime, Anywhere:**  
Reimagine Where,  
When, & How Quickly  
Care Can Take Place

HOW



**Seamless Integration:**  
Deliver an Integrated Experience  
across the New Health Ecosystem





The five strategies are interrelated:

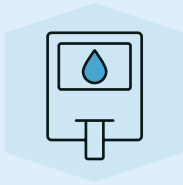
**Everyday Wellness** represents the shift in the consumer's perspective, and answers the why behind innovation decisions. It is influenced by broad social, cultural and demographic changes, and therefore affects the entire market.

**Seamless Integration** represents the delivery mechanism – and addresses how design and technologies should deliver new products and services.

**Empathic Care**, **Data-Informed Personalization**, and **Anytime, Anywhere** are the tactics a company can pursue that address the why, and leverage the how: in other words, the what. A company could tackle one, two, or all three of these directions as part of its innovation strategy.



WHY



Management of diabetes and other chronic diseases through tracking blood sugar, medications, food, and activity

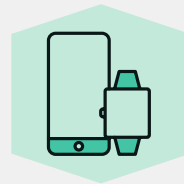
WHAT



Personal diabetes coach



Prompts action based on real-time aggregated data



Mobile + watch app & 24/7 response specialists

HOW



Integrated services and delivery across physical and digital platforms

## The Framework Applied

Products by One Drop, Omada Health, and Livongo — the startups we introduced earlier — incorporate all five of these strategies in tandem. They move seamlessly between prevention, treatment, and management, helping the patient lower their glucose levels through biometric tracking. In addition, the devices help reduce the risk of diabetes becoming a gateway disease to other serious health issues.

Rather than assuming behavioral change is a cinch, personal coaching is included to take your own healing journey into account. The coaches' recommendations are in part based on data: one product predicts what your blood glucose will be in eight hours, based on past actions — and suggests steps you can take to counteract a possible blood glucose spike or drop. Mobile app and coaching services are available 24/7.

Lastly, these products are an “Internet of Things” solution that integrates digital and physical experiences: as a complete system, it delivers everything you need as a diabetic: from the bluetooth glucose meter and monthly delivery of test strips, to the biometric tracking and curated reports for your physician.



# Future-Readiness Checklist:

## Are you prepared to lead in the future of your industry?

Are you taking the consumer into account as you're planning for future innovation? Are you making use of tactics and plugging into digital-physical integration tools that are either in use now or emerging in the marketplace? Are you using strategic foresight to develop plausible and desired futures, and to challenge industry norms?

Most organizations *react* to the trends of the future. These organizations are vulnerable.

Some organizations *anticipate* and create robust strategies to respond to the different future. Very few organizations lead and create the future they want. Where does your organization fall?

Use this checklist as a tool to gauge your overall approach. Is your innovation **Incremental, Strategic, or Visionary?** Ideally you should be active across all three. **Where are you now, and where do you want to be?**

	INCREMENTAL	STRATEGIC	VISIONARY
PRODUCT	<input type="checkbox"/> Our product planning improves current products, services, or business models	<input type="checkbox"/> Our product planning aims to fulfill emerging market opportunities.	<input type="checkbox"/> Our product planning aims to deliver moonshots and create new market opportunities.
PROCESS	<input type="checkbox"/> We have a process to identify opportunities in the current market.	<input type="checkbox"/> We have a process to track disruptive industry trends and anticipate market direction.	<input type="checkbox"/> We have a process to envision our preferred future and develop strategic actions to achieve it.
PEOPLE	<input type="checkbox"/> Our teams can implement innovative concepts that deliver better performance.	<input type="checkbox"/> Our teams can strategically integrate business, technology, and consumer trends into innovative solutions.	<input type="checkbox"/> Our teams can think beyond current business and industry imperatives to reimagine the future.
KNOWLEDGE	<input type="checkbox"/> We have a good understanding of growth opportunities that deliver immediate impact.	<input type="checkbox"/> We have a good understanding of emerging opportunities.	<input type="checkbox"/> We have a good understanding of plausible futures and have articulated our future vision.



# The healthcare industry is evolving more quickly than ever.

Health and wellness is no longer limited to healthcare companies.

Big Tech, platform-based startups, electronic goods, food manufacturers, and fitness giants have all entered this market. It is imperative that legacy companies reevaluate their playing field and capabilities.

Innovations deeply rooted in addressing human needs – for wellness, empathy, personalization, convenience, and simplicity – are the ones that

will survive. Pairing those needs with industry and technological trends to envision plausible futures of health and wellness is the first step required to creating innovations that not only anticipate future landscapes, but that help to shape that future as well.

## What is your vision of the future?

These five strategies will help you anticipate and lead:



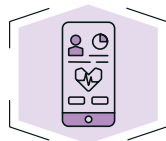
### 1 EVERYDAY WELLNESS

Redefine Healthcare As Preventive & Proactive



### 2 EMPATHIC CARE

Cultivate Empathy Through Relationships, Services, & Spaces



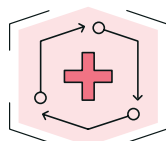
### 3 DATA-INFORMED PERSONALIZATION

Utilize Data to Provide the Right Care For The Right Person



### 4 ANYTIME, ANYWHERE

Reimagine Where, When, & How Quickly Care Can Take Place



### 5 SEAMLESS INTEGRATION

Deliver an Integrated Experience Across the New Health Ecosystem





# How to Design Health Products of the Future

Ryan Chen & Anat Mooreville

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