



advanced
digital
institute

ALIP 3
Mainstreaming ALT
Industry Panel Meeting
November 2011

Agenda

“DALLAS and 3 Million Lives” : Consumer model (ADI/Leeds)

- Tools for modelling
- Routes to market
- Approaches to market assessment

“Compete /Collaborate” : The business of interoperability (ADI)

“Who are the new (NHS) Buyers ?” - Huw Jones

Opportunities to engage : (Leeds)

“Patient Capital?” Social Finance for Health

Panel feedback and discussion



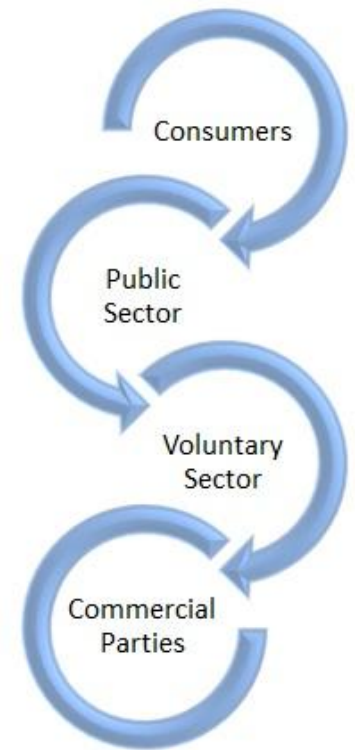
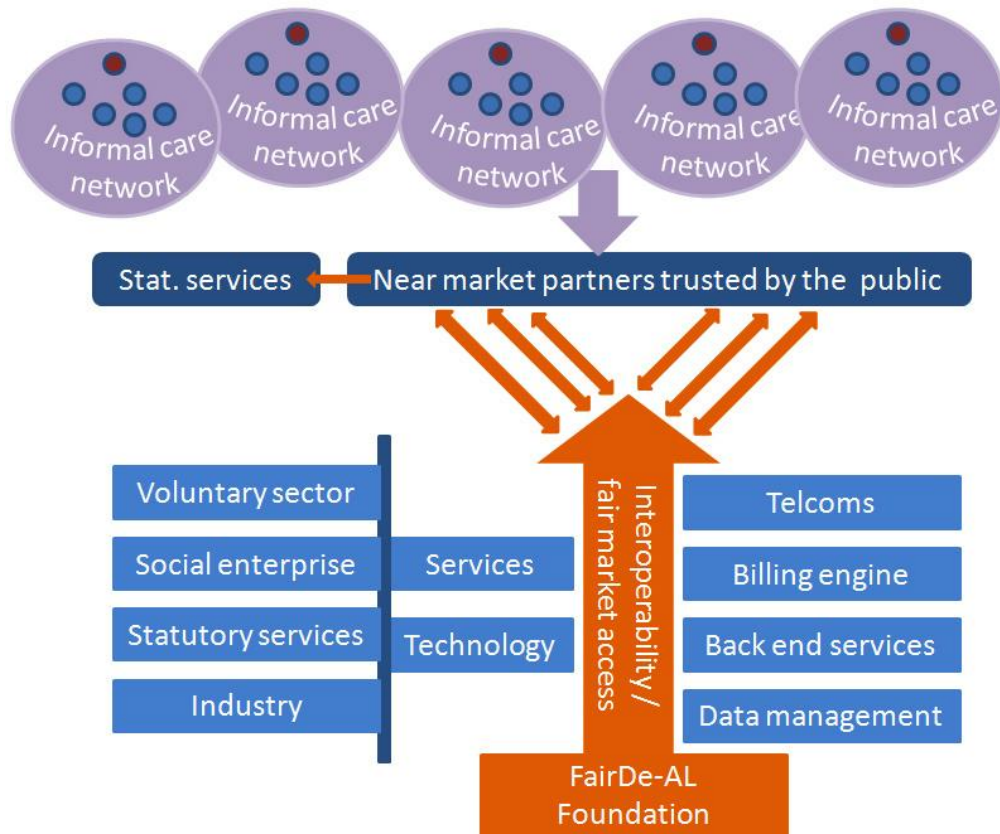
“3 Million Lives”, DALLAS and the Consumer Market

Some questions ...

- How far are we away from a “healthy, vibrant” market for ALT ?
- What is market structure ?
- What might it look like ?
- What interventions might help start / accelerate the market ?



Example Approach - Brokerage Model



Example Approach - Brokerage Model

Work stream 1 Statutory sector

(led by Kent County Council targeting users already engaged with the statutory sector)

Work stream 2 Voluntary Sector

(target users of The Stroke Association, Carers UK, Voluntary Action Sheffield and Diabetes UK)

Work stream 3 Retail Sector

(Candidate retail partners will be identified and engaged to develop consumer led service offerings)

Platform Work stream

Customer Insight, market research, platform development, interoperability, service brokerage design, certification, Cross DALLAS engagement



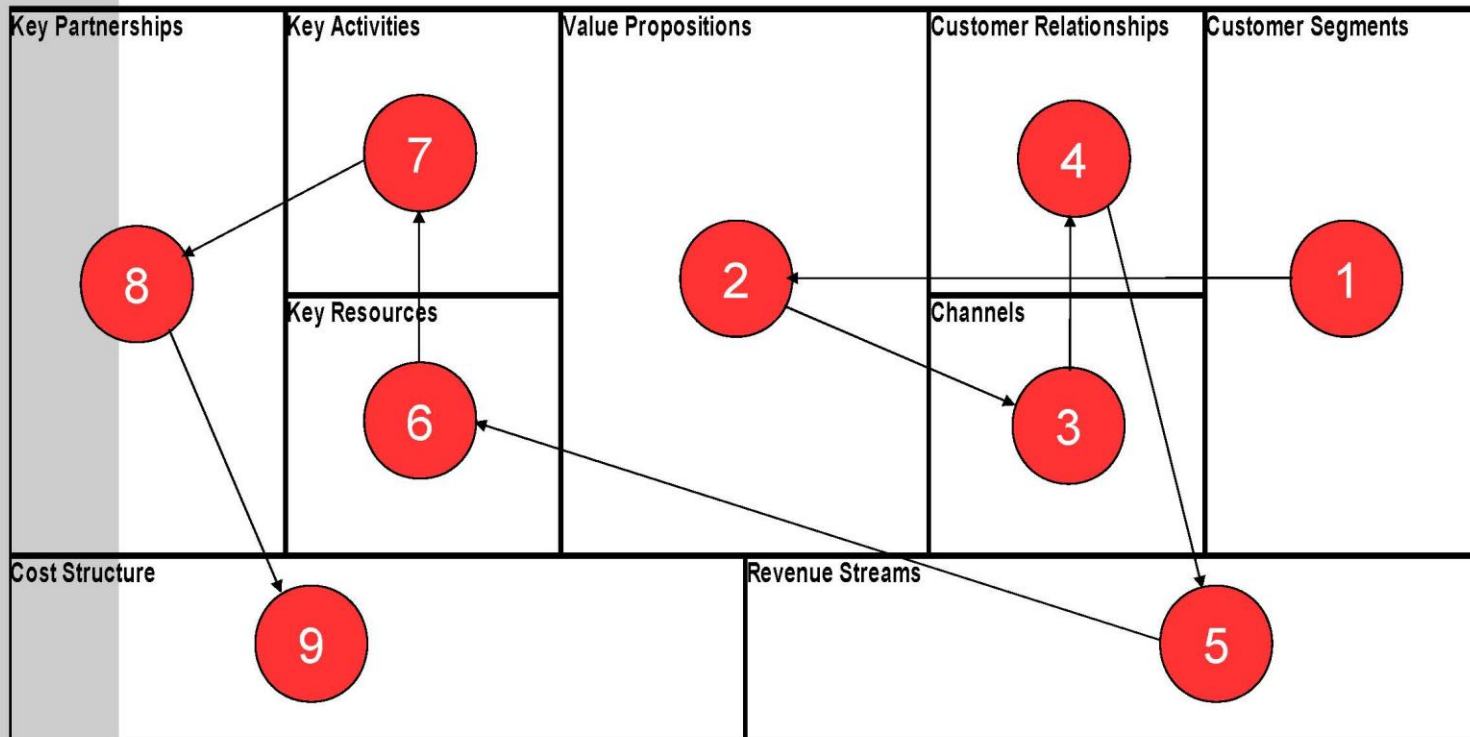
Modelling of multi-sided consumer platform..

Business Model Canvas Development

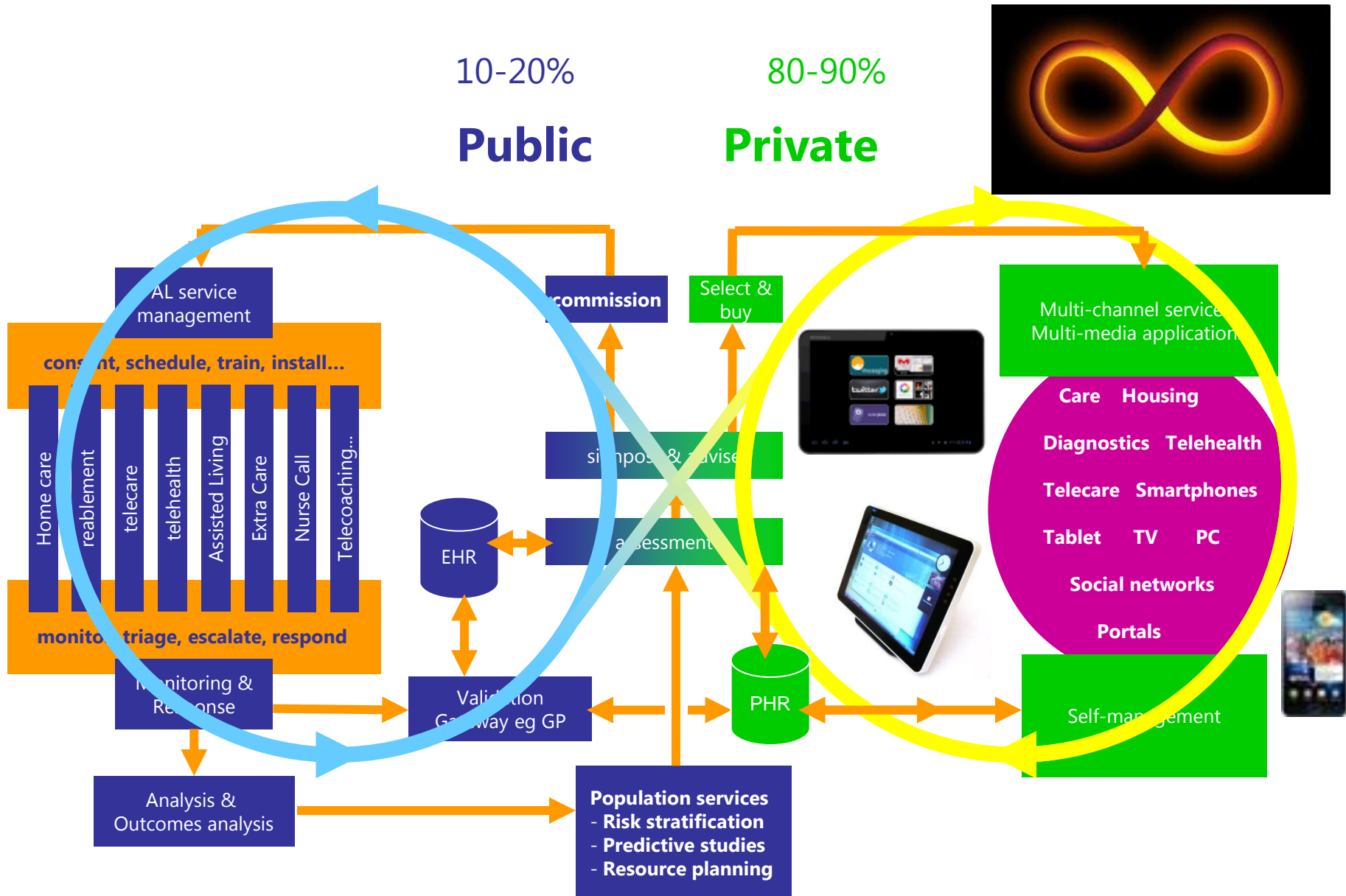


Business Model Canvas

Title:



The business of interoperability...



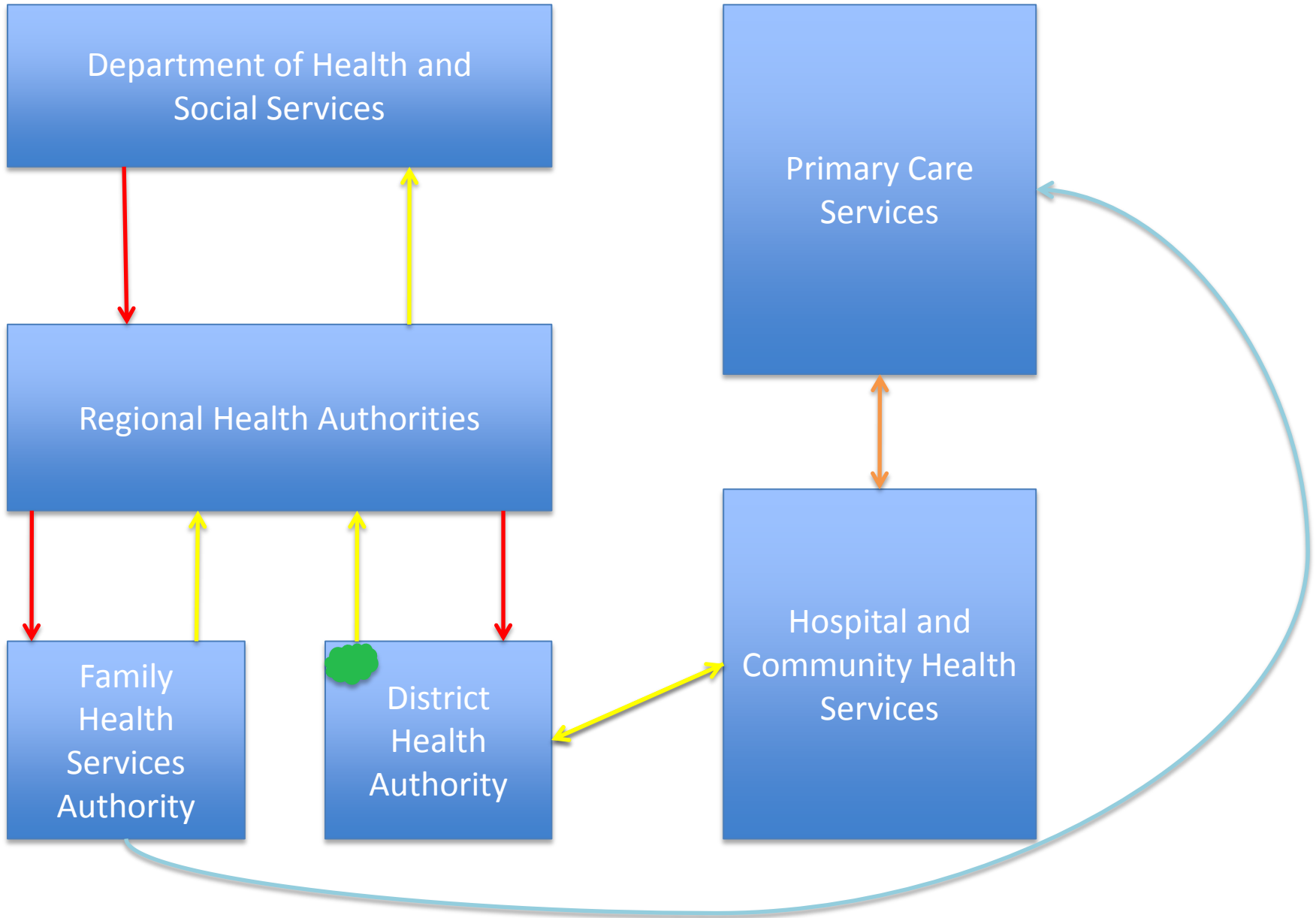
BUYERS, BUYERS – WHERE ARE YOU?

Huw Jones

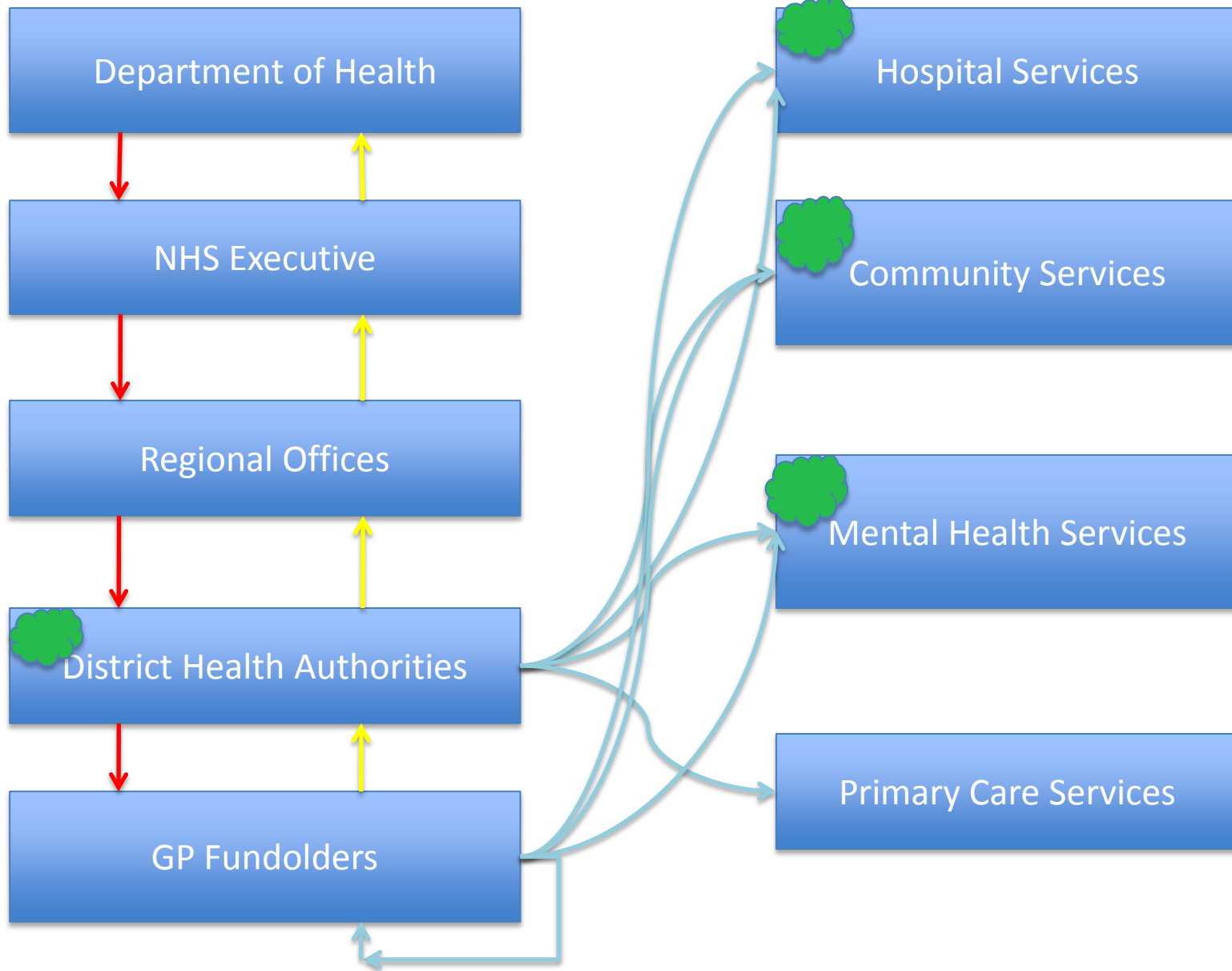
Telehealth Consultant

Advanced Digital Institute

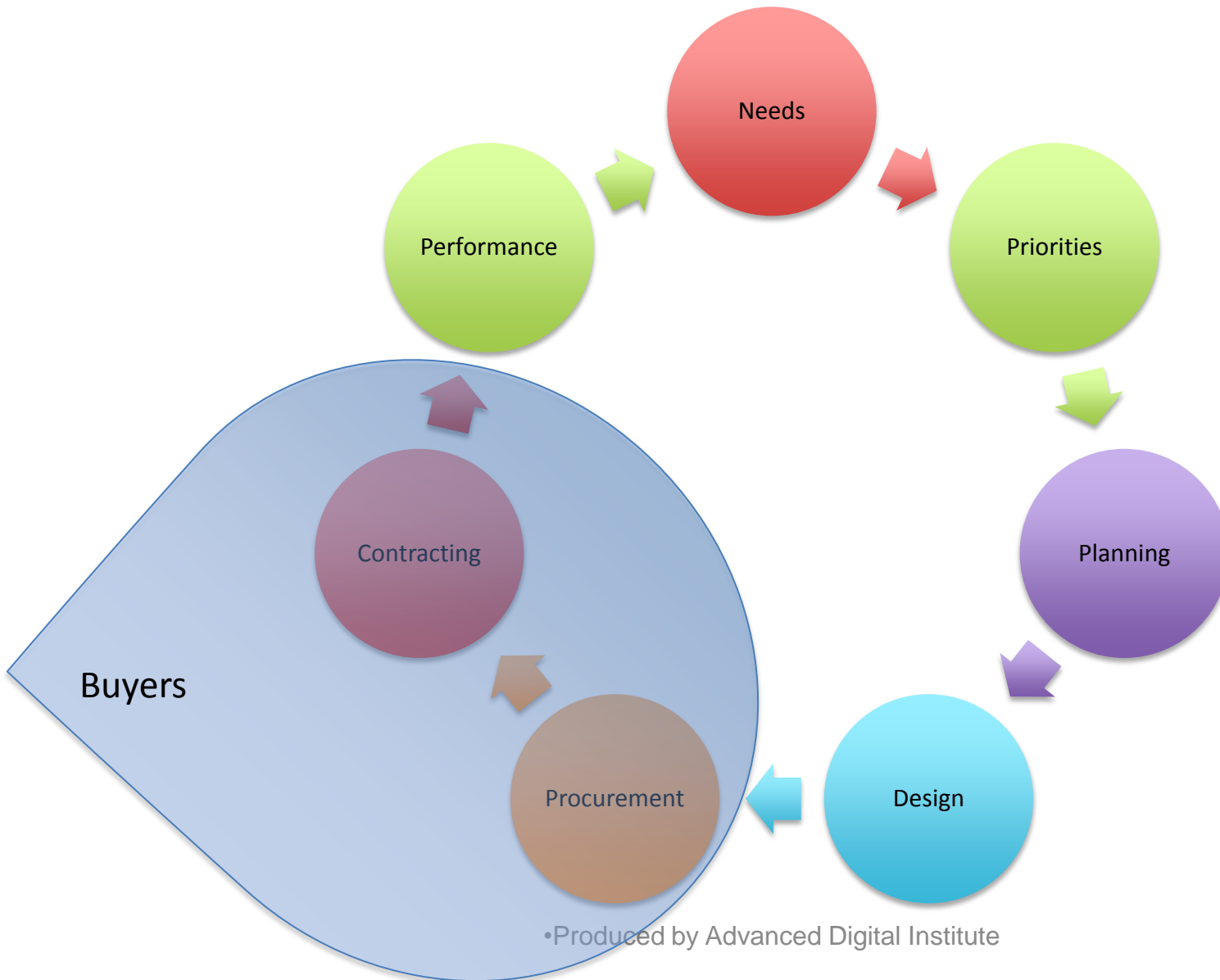
PRE NHS MARKET



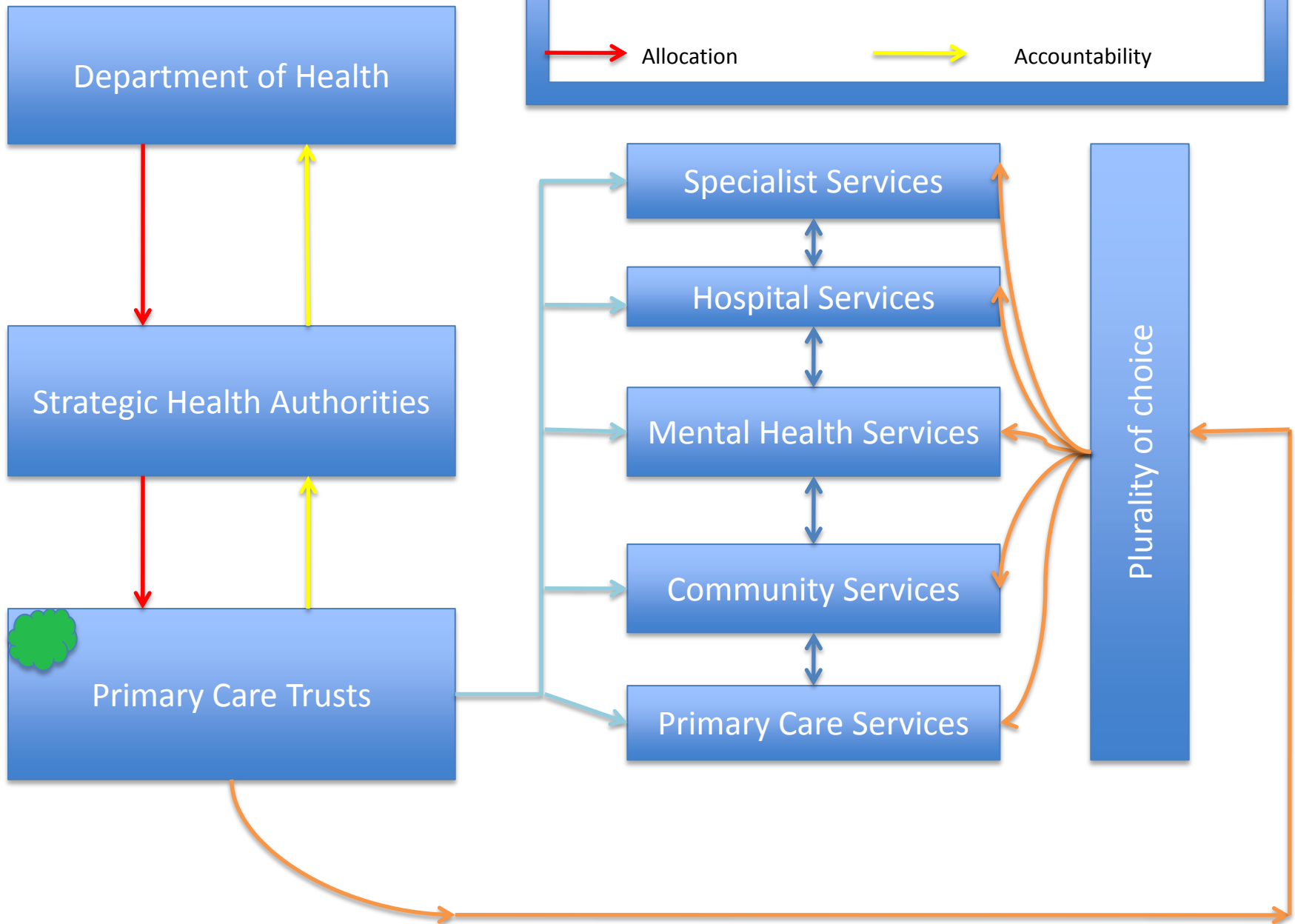
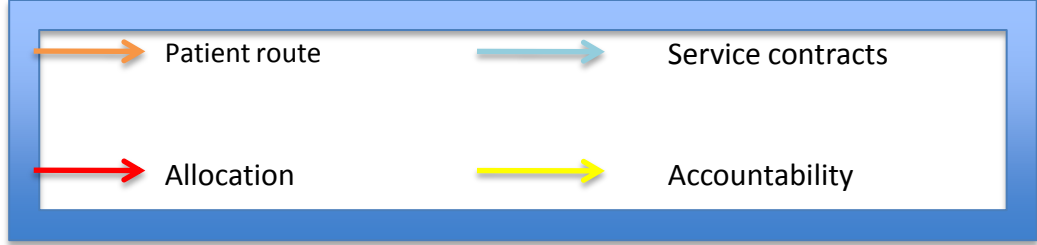
THE INTRODUCTION OF THE NHS MARKET



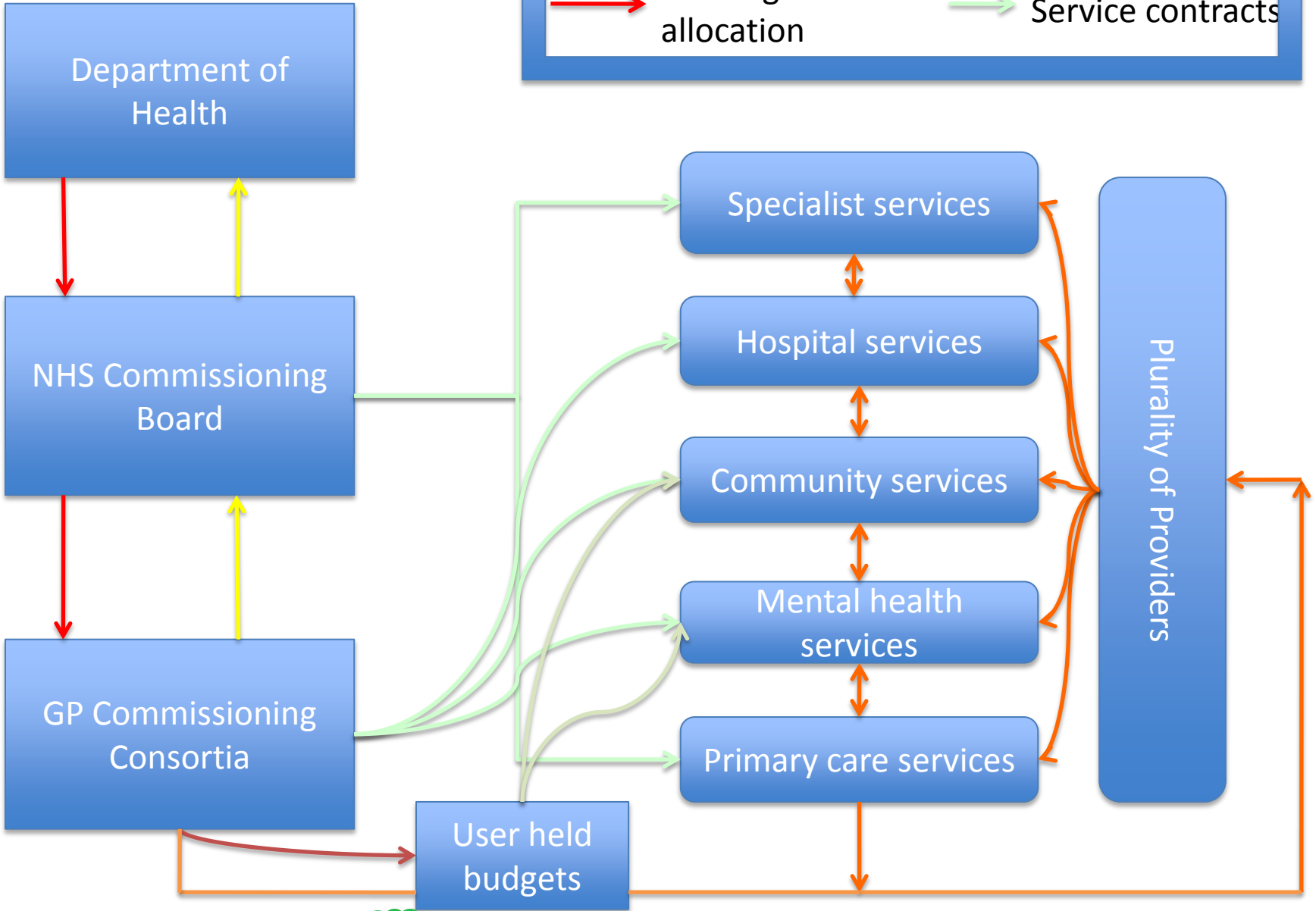
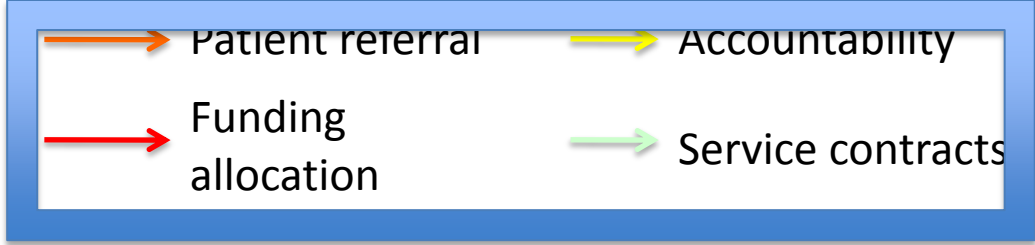
Commissioning



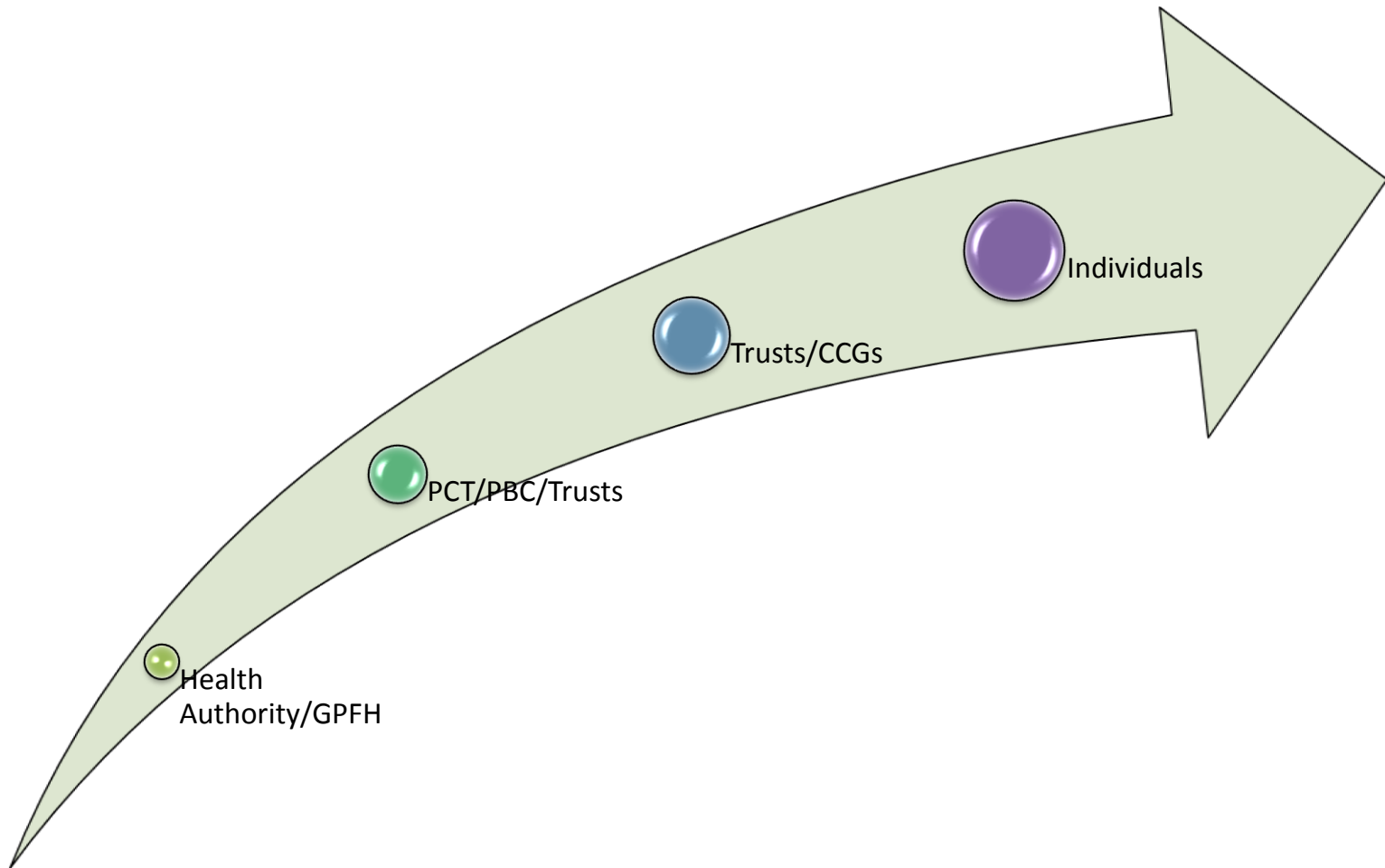
2000-2011



2012-?



The Changing Buyers



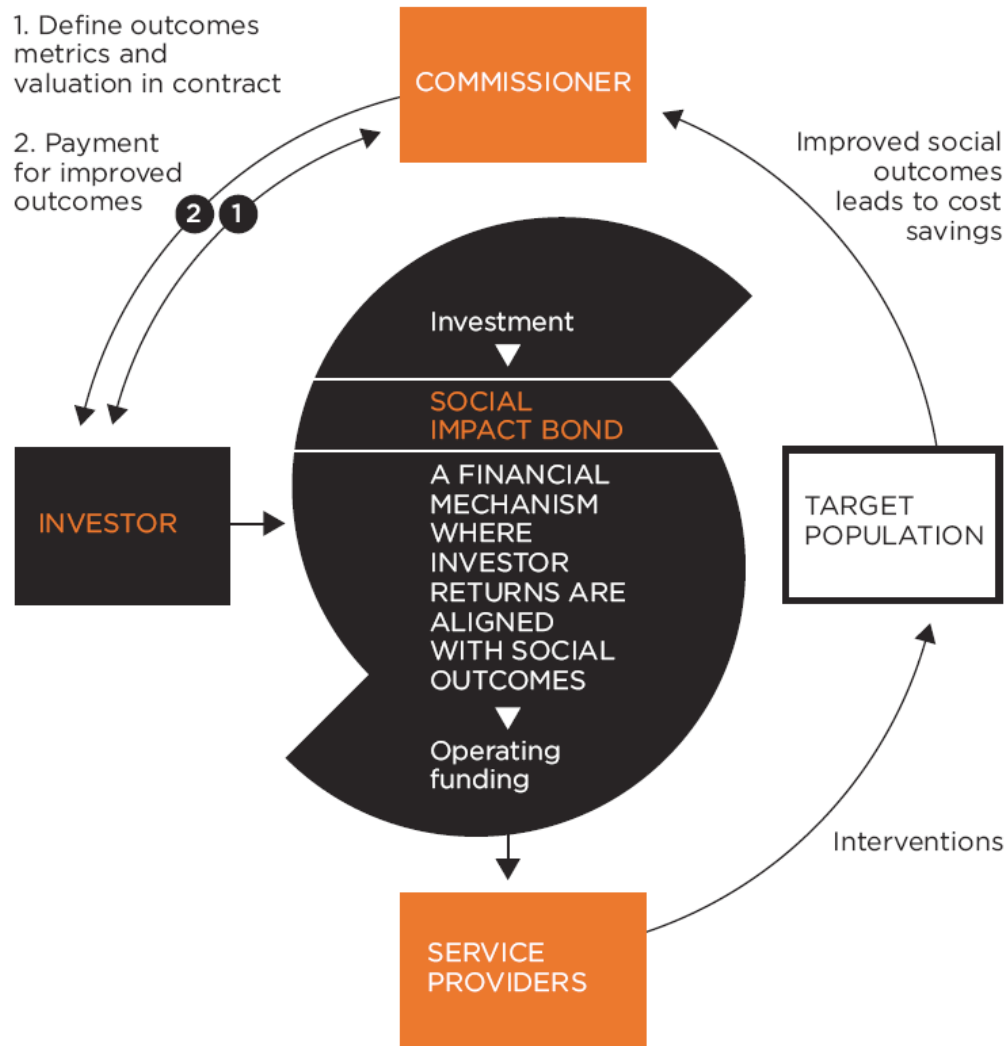
3 layers of service – different buyers?

- **Level 1** – Simple – retail purchase of stand alone equipment
- **Level 2** – Complex – interoperable equipment with “freemium” facility
- **Level 3** – Complicated – interoperable equipment, user feedback, freemium facility and information to/from clinician

Questions

- Will procurement change – from input to outcome? From questionnaire to competitive dialogue?
- Will the business model change from input (machine related) to outcome (savings and health related)?
- Never mind the buyer – who will be the seller?

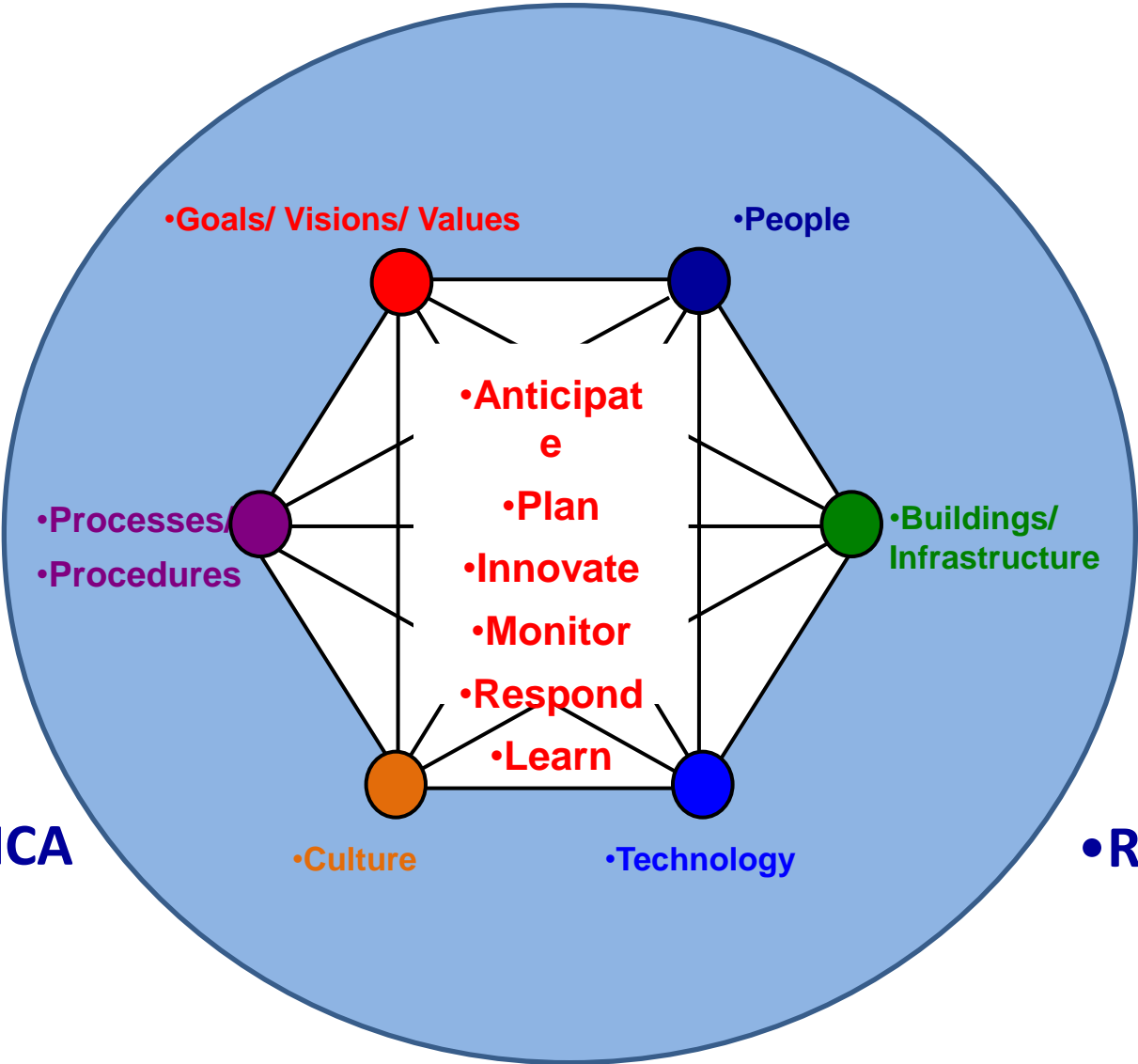
Social Impact Bond Model – “Social Finance”



**Socio-Technical Centre
(STC) –
Impact through
Partnership**

CHM

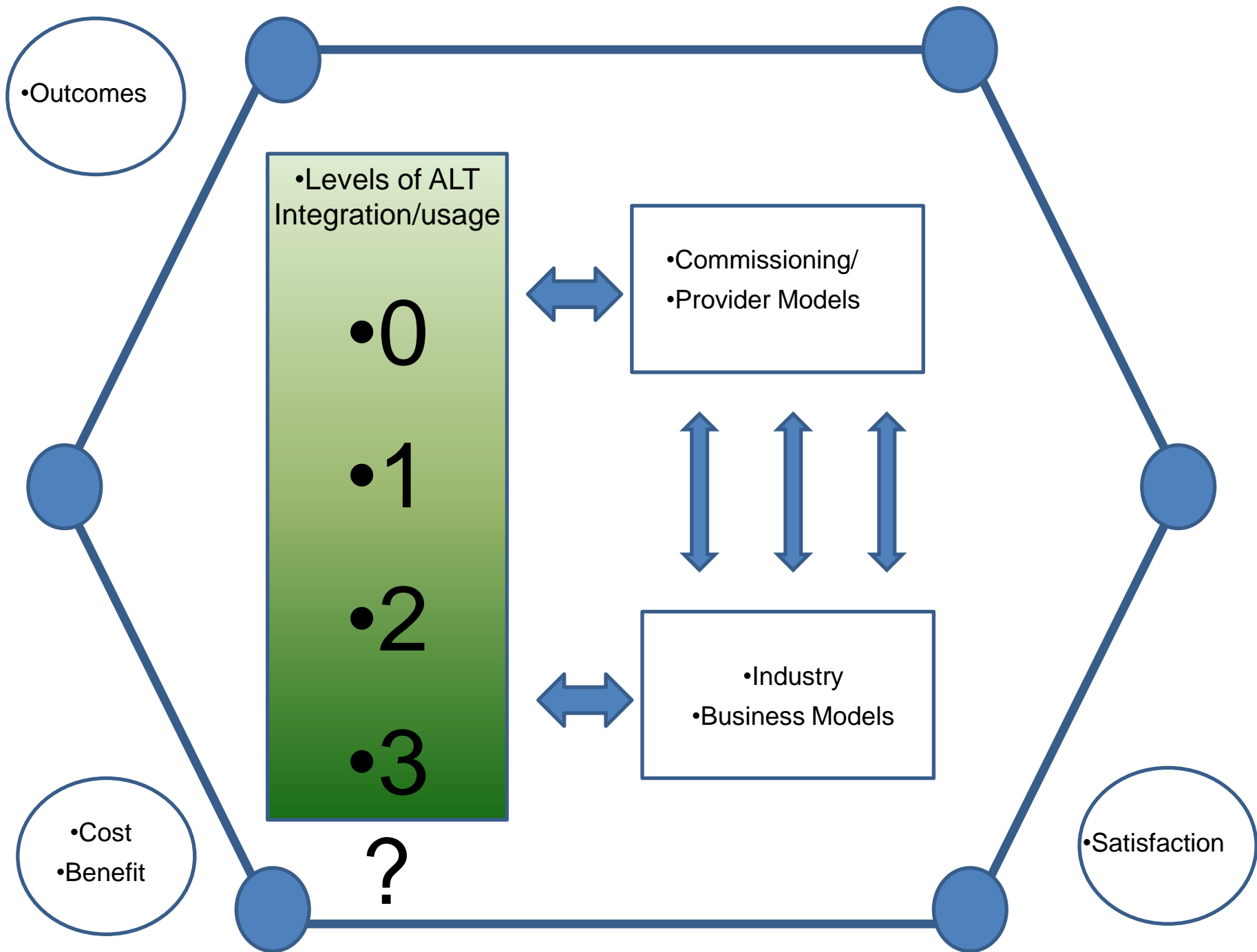
•ECONOMIC



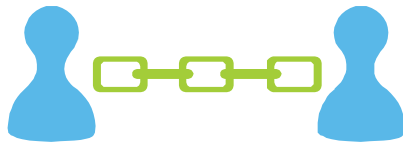
•POLITICAL

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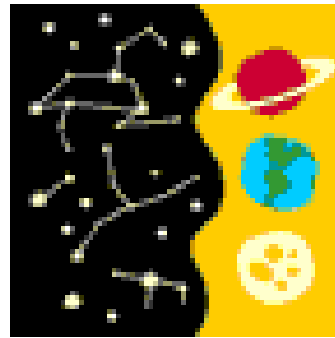
•REGULATORY



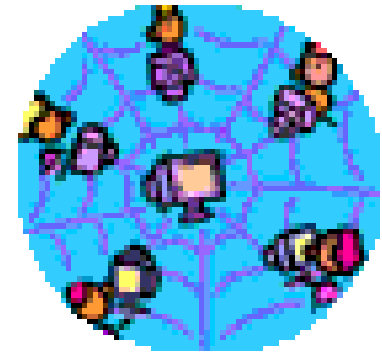
Adding Value: Business Models



•Chains



•Constellations



•Networks

Present vs Emerging Care Models

•Over 80% of NHS contact is face to face.

•Health
•Monitoring

•Security
•Monitoring

•Memory
•prompts

•Safety
•Monitoring

•Environment
•Monitoring

•Motivational
•Coaching

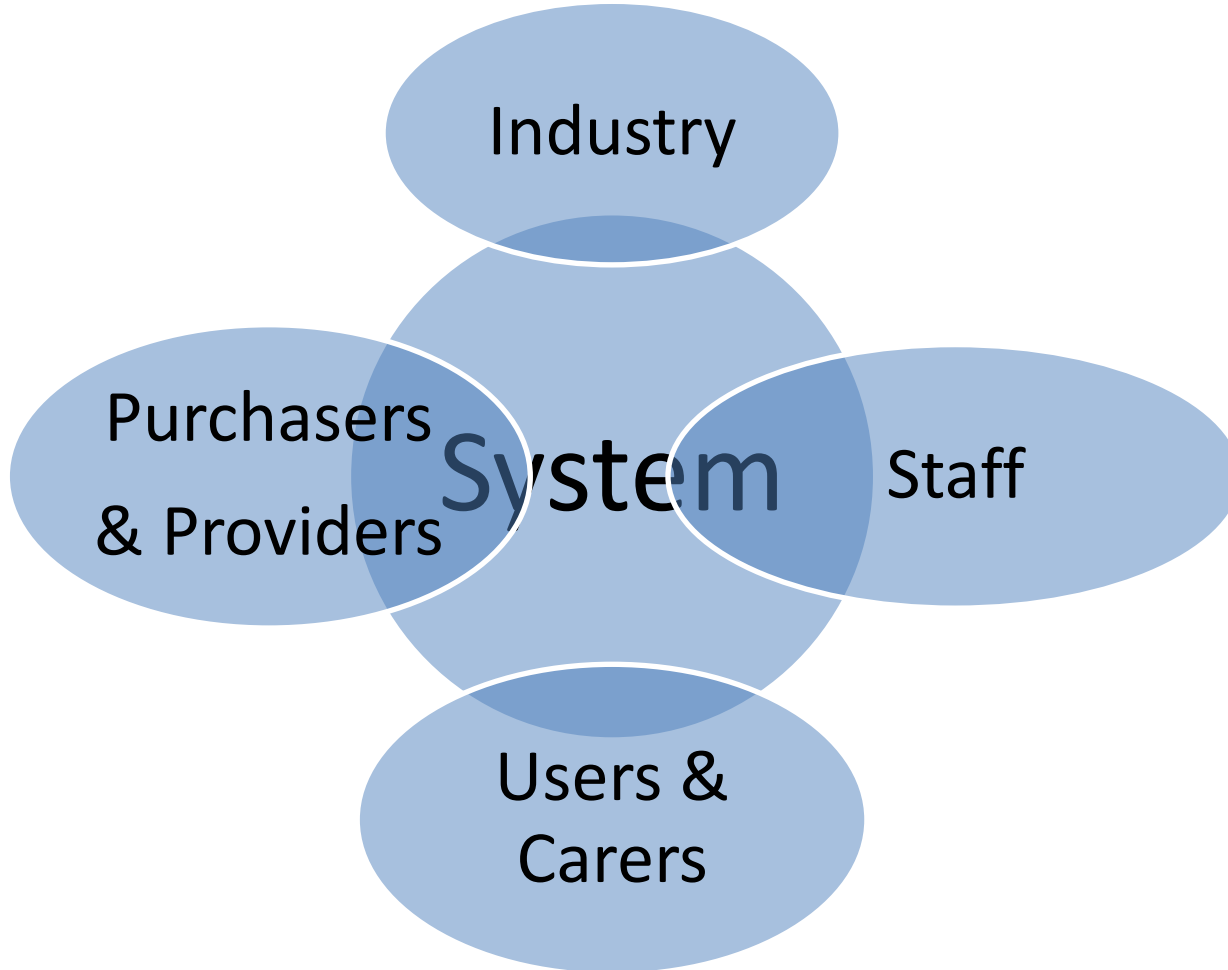
•Online
•Advice

•E- consultation

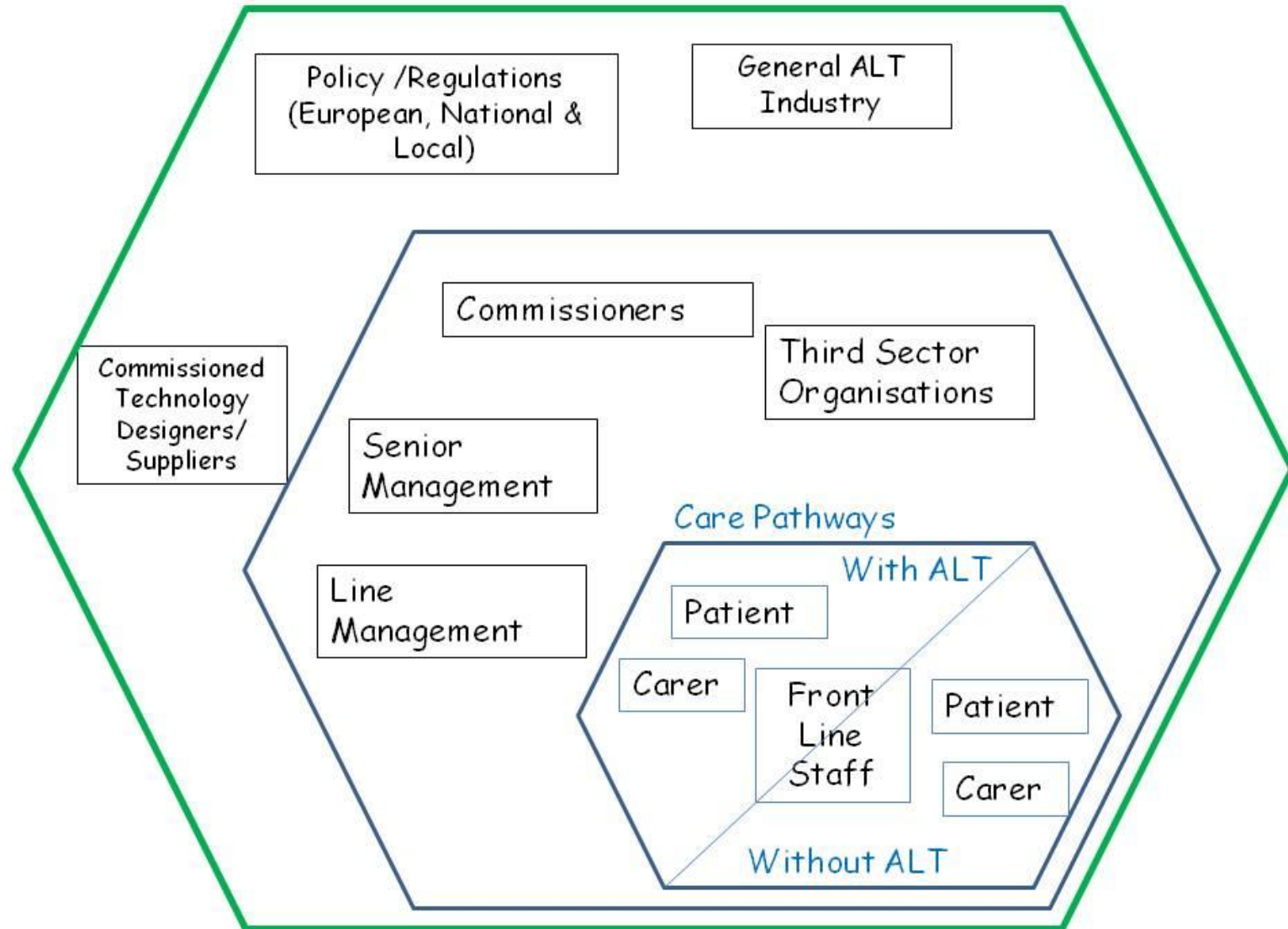
•Social
•Networking

•All these new services
•can complement existing
•delivery mechanisms.
•With richer and more
timely information we
can make better
decisions about the
most appropriate care.

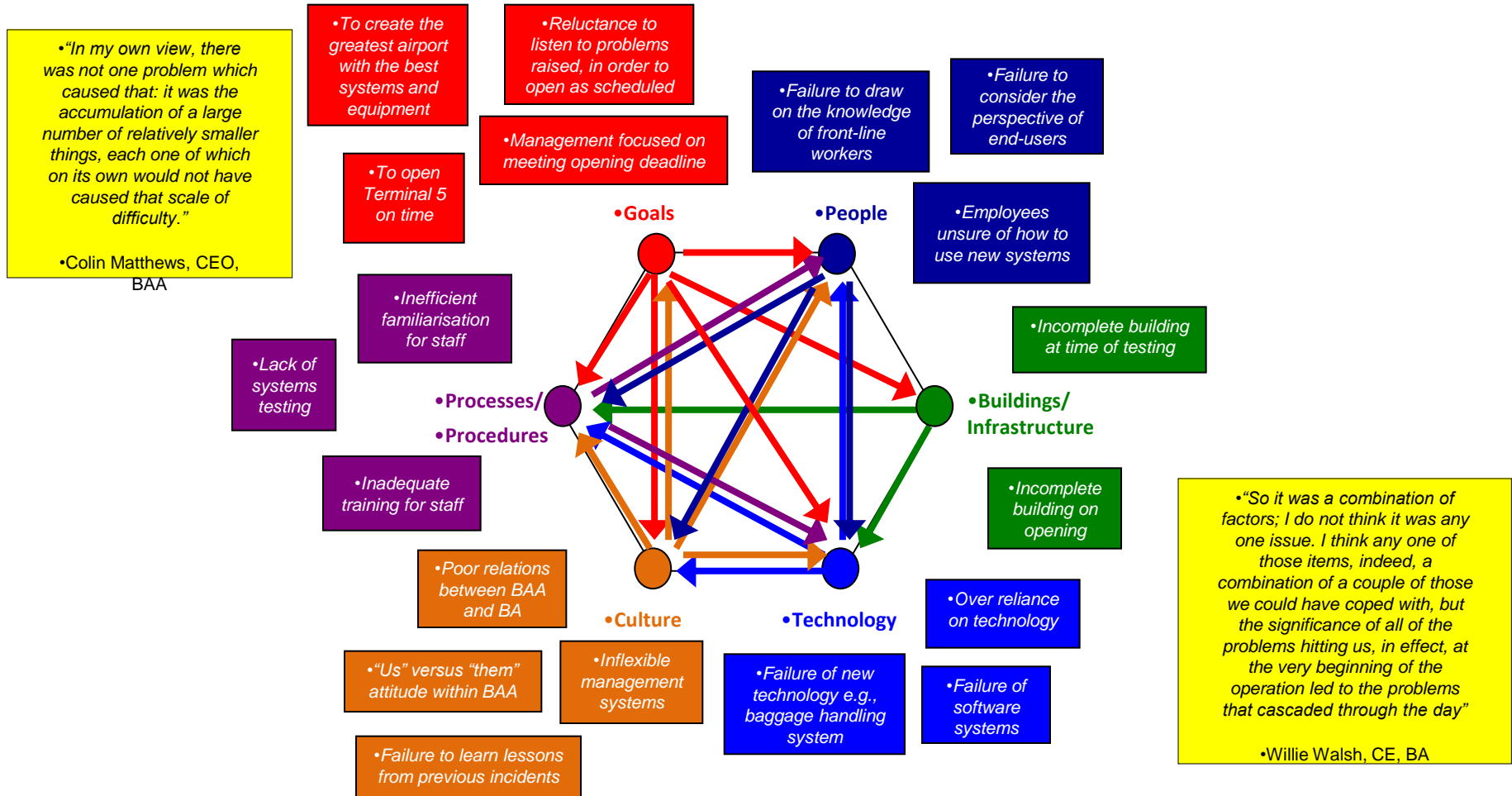
System Perspectives



Preliminary ALT System View



The Opening of Heathrow Terminal 5



Invitation

- Complete system information is key to unlocking the telehealth market.
- We are speaking to key people in industry to compliment and direct our investigations with health care commissioning, providers and third sector.
- We would like input from a variety of commercial telehealth stakeholders.
- An opportunity to reflect on the issues, set priorities and get the most from this project.

Industry Perspectives

- Current market approaches and business model
- Experience of current and past projects
- Industry identification of stakeholders

Industry Engagement

- Experience with the NHS and other buyers

Future Directions

- Barriers and Facilitators
- Ideal business models vs current constraints

Benefits/Outcomes



Introducing IT solutions is notoriously difficult.

20% of projects deemed a success

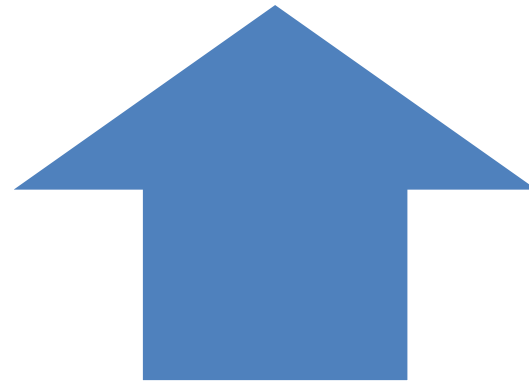
40% of projects partially succeed

40% are deemed complete failures



This project takes a new approach to the mainstreaming of telehealth.

With the objective creating a **sustainable business climate** for telehealth built on an understanding of the influence of each element of the system.



Project Set Up

- **Done**

- ✓ Project teams in place
- ✓ Sites identified
- ✓ Ethics approval gained
- ✓ Research questions and methods drafted
- ✓ Literature review undertaken
- ✓ Research tools piloted

- **Next Steps**