



AN INNOVATIVE HEALTH AND WELLNESS SOLUTION FOR YOUR COMPANY



INTRODUCTION

With Canadian healthcare costs increasing and the pressure for companies to implement employee health and wellness initiatives rising, healthcare innovation is blossoming through several technologies like telemedicine.

In this white paper, we'll review the current state of healthcare in Canada and explore how telemedicine can significantly benefit employers and their employees.

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HEALTHCARE IN CANADA

Technology and societal needs have evolved and greatly changed over the last several decades, but the Canadian healthcare experience has remained virtually the same. The current healthcare delivery system¹ is outdated and struggling to respond to current budget realities, consumer expectations and technological advancements. Rising healthcare costs, chronic diseases, and an aging population are increasingly exerting pressure on the traditional care models in Canadian primary care.

Accessibility issues

57% of Canadians can't get a same- or next-day appointment with a doctor.²

Access to after-hours care is difficult with only **1 in 3 patients able to receive medical care in the evenings, on weekends, or on holidays** without going to the emergency department.

ER wait times are estimated at 4 hrs on average, and to see a specialist, it often takes weeks or months.

Reactive instead of proactive

Rather than a holistic or a root-cause approach, clinical encounters are focused on the immediate symptoms and treatments.³

Patients contact healthcare professionals when they have noticeable symptoms and tend to passively receive treatment.

The care delivery model is mainly episodic rather than geared towards promotion of health or disease prevention strategies.

Provider-centric instead of patient-centric

The way healthcare is currently delivered is rigidly siloed, and determined by factors such as primary care physicians' time and access to resources (technology, staff, etc.) rather than centred on the patient's needs and desired outcomes.³ Studies demonstrate that such barriers pose challenges in the administration of preventive care.



HEALTHCARE IN CANADA

Health costs are unsustainable

There are growing concerns that government healthcare costs are unsustainable, given the demands of an aging population, budget priorities, expensive treatment protocols, and pharmacare.¹ For every province in Canada, healthcare is the single largest budget item.⁴ With an increase in healthcare spending of 116.4% outpacing the growth in GDP (see figure 1), worries arise regarding the sustainability of healthcare spending in Canada. Such an increase can have a significant impact on a government's fiscal balance, the resources available for other programs such as education and social services, and/or tax competitiveness.

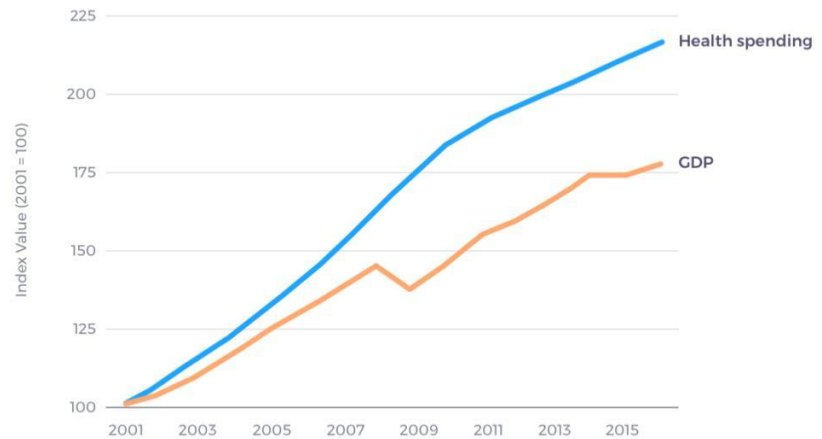


Figure 1: Canadian Healthcare Spending and the GDP

Source: Fraser Institute, March 2017: The Sustainability of Health Care Spending in Canada 2017

Burden shifting to employers

A study by Mercer⁵ estimates that employer healthcare costs will climb by 130% between 2015 and 2025 (see figure 2). The burden of the growing strain is expected to be transferred in part to patients in the form of longer wait times and decreased quality in care, and to benefits plan sponsors and employers as increases in health-related costs. The higher costs will be driven by specialty drugs, higher rates of chronic and mental illness, and increased health pooling costs.

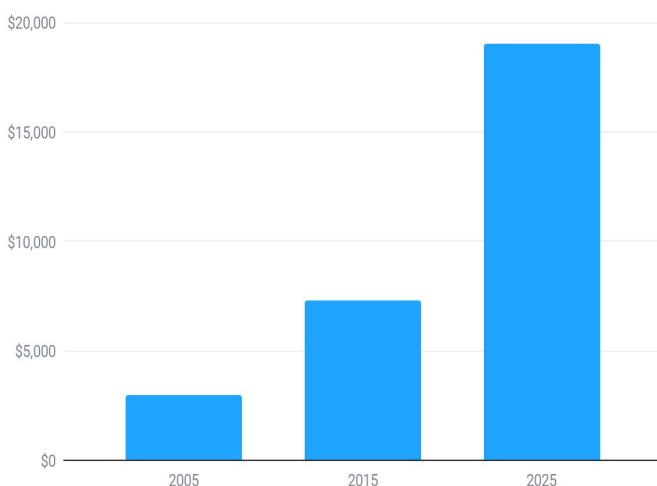


Figure 2: Average annual health benefits cost/employee (Ontario)

Source: Mercer, May 2017

WHAT IS TELEMEDICINE?

Given the financial burden on organizations, the majority are increasingly offering health and wellness initiatives in order to minimize health-related costs, implement preventive strategies and decrease short- and long-term disability claims.⁶ Innovative technologies like telemedicine have evolved to help companies save money, enhance employees' physical and mental health, and enhance the patient experience.

The terms telemedicine and virtual healthcare are often used interchangeably, and several provincial guidelines have already been established on the use of telemedicine, its safety and privacy of information.

Telemedicine is defined as **"the remote diagnosis and treatment of patients by means of telecommunications technology"** and is a form of care that doesn't require a physical presence or exam.

Adoption of telemedicine elsewhere in the world

The US Government and private market have quickly adopted telemedicine services via proposed Medicare and Medicaid programs. However the telemedicine trend has been largely driven by employers and private insurers:

- In 2017, over 75% of Fortune 1000 corporations included telemedicine as part of their comprehensive benefits package.⁷
- In a survey of 678 US employers, Willis Towers Watson finds that 78% of respondents are encouraging their employees to use telemedicine to replace expensive office or clinic visits, and another 16 percent are planning or considering that telehealth option by 2019.⁸
- A study finds that by the year 2020 nearly all companies offering group health care plans will offer telemedicine as part of their offering.⁹

Although the US healthcare system is different from Canada's, the wide adoption of telemedicine should not be ignored as it serves as an example for the uptake of an innovative healthcare service to complement the traditional care model.

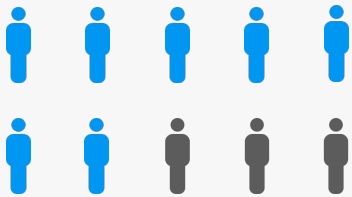
Some European countries have adopted favourable laws with respect to virtual care, such as reimbursement of tele-consults, permission for e-prescriptions and recognition of cross-licensing within the EU. In China, one of the largest telemedicine providers in the world counts over 192 million users.



WHAT IS **TELEMEDICINE**?

Is Canada ready and willing to use telemedicine?

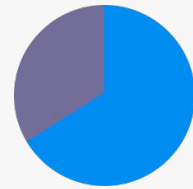
With the rising availability of telemedicine in Canada and a digital revolution in the healthcare industry, interest and adoption levels are increasing accordingly.



7 in 10 Canadians would take advantage of virtual physician visits



6 in 10 Canadians are excited about artificial intelligence's (AI) potential in healthcare but would only trust the diagnosis if delivered by a physician



70% of Canadians believe that incorporating more technology into personal health care can help prevent illnesses

Source: Canadian Medical Association, August 2018

Most Canadians see virtual visits leading to care that is more timely, higher quality more convenient. Support for virtual visits is highest among those who've had a virtual visit before, 18- 34 year olds, heavy users of the health system (11 or more visits per year) and parents.

While there are concerns that virtual care can lead to a loss of human touch and compassion, Canadians overwhelmingly embrace technology and AI in health, and feel that it could be used preventatively.

WHO IS THE CANADIAN TELEMEDICINE LEADER?

As interest in telemedicine increases for patients seeking care, as employers search for health and wellness initiatives, and as digital evolution enables further innovation in the delivery of healthcare, new telemedicine market entrants have been appearing.

Dialogue is the largest and fastest-growing telemedicine company in Canada and is focused exclusively on providing businesses with progressive, premium and affordable virtual healthcare.

Dialogue empowers employees to be proactive about their physical and mental health in order to help organizations reap the significant benefits associated with happier and healthier employees.

By focusing solely on organizations, Dialogue offers a customized, client-centric experience. Dialogue has the knowledge required to support HR leaders and executives from various industries– including heavily-regulated ones like insurance and financial services– and different-sized organizations ranging from a few employees to over 10,000.

What can patients expect from Dialogue?

Key Features:

- Unlimited on-demand, mobile access to a range of healthcare professionals for employees and their family
- Available on smartphones, computers or tablets
- Bilingual services available in every Canadian province.



Interact with our nurses

Direct messaging, video or calls for your employees and their families.



Direct video access to doctors

Consults, diagnoses, referrals, prescriptions, and much more.



Care navigation & seamless referrals

High-touch guidance throughout all facets of the healthcare system.



Prescriptions & free delivery

Prescriptions, renewals, and free medication delivery.

DIALOGUE AND EMPLOYEE MENTAL HEALTH

As employers consider employees' mental health issues a priority to address in order to avoid the high costs associated with short- and long-term disability claims, absenteeism and "presenteeism" (working when illness affects productivity), Dialogue offers a unique program to proactively manage and treat these issues with expansive clinical services.

The service is an integrated, end-to-end case solution based on 4 pillars that allows patients to overcome the barriers associated with mental health treatment.

1

Scientific screening

delivered to all
using the
technology at our
fingertips

2

The Dialogue method

a multidisciplinary
and multichannel
approach centred
around the
patient's needs

3

High-touch habit-forming

approach to
decrease stress
levels

4

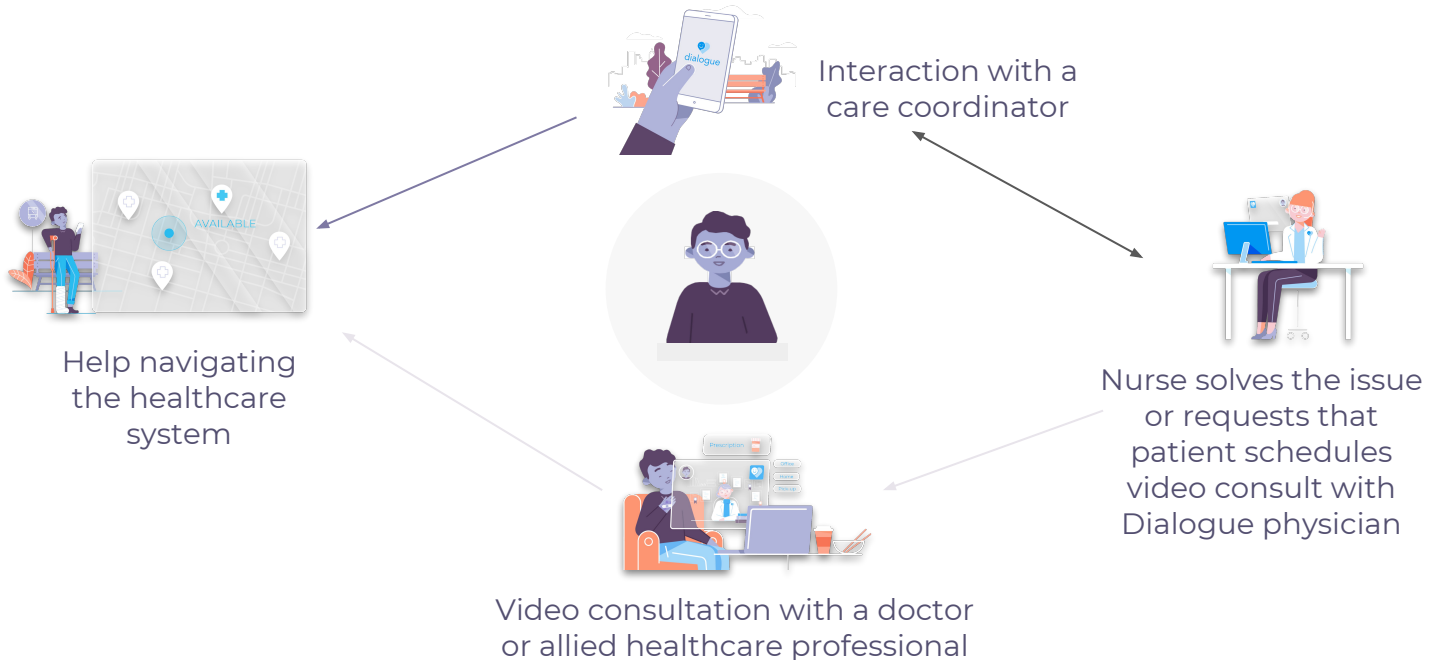
Close follow-ups

to ensure treatment
adherence



PATIENT WORKFLOW

Here is an example of a patient workflow with Dialogue:



Possible Outcomes



Dialogue offers employees a personalized healthcare ecosystem to help patients proactively and preventively address health and wellness issues in a convenient and efficient manner.

To ensure high-frequency touchpoints are applied throughout the patient experience for both physical and mental issues, Dialogue's medical protocols are

designed and implemented by a Medical Board composed of 3 physicians, 1 nurse practitioner, 2 nurses and 1 care coordinator, and delivered by a team of over 100 engaged medical professionals.

The medical team diligently integrates and optimizes patient workflows focused on safety and evidence-based medicine in order to ensure that best practices of medicine are rigorously applied in all cases.

OVERCOMING BARRIERS TO TRADITIONAL CARE

Traditional interaction between patients and the healthcare system suffers from a host of barriers affecting access, quality, and timeliness of care. Dialogue's service offering helps address these issues in different ways:

Barrier

Dialogue's Offer

Getting a fast medical opinion

Convenient, on-demand access to physicians and nurses who can evaluate and treat patients

Access to professionals and specialists, limited geography

Can refer patients to a network of allied-health professionals and to medical specialists

Access to tools/self-help

Every video consult is followed with a care plan, navigation support, follow-ups, and self-management resources (when needed)

Procrastination, embarrassment, discomfort or fear associated with in-person medical consultation (e.g. stigma regarding consultations for mental health issues)

Multichannel approach allows users to choose the communication method they prefer

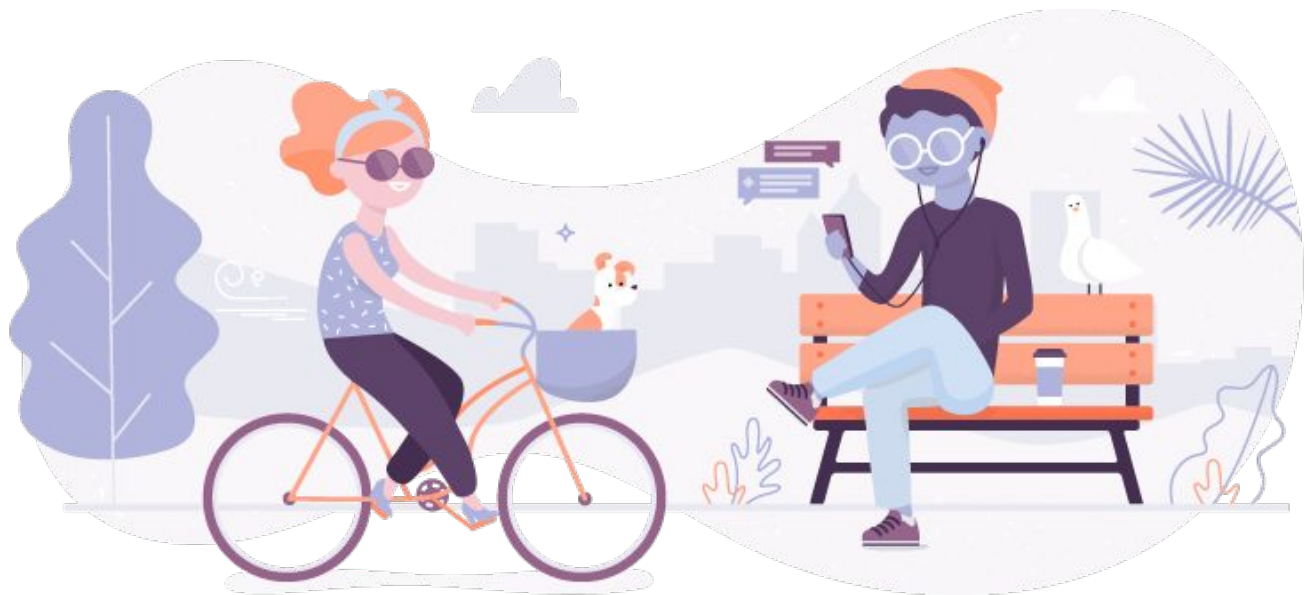
Infrequent and short medical consultations

Employer-sponsored unlimited primary care (no cost to patient)

A PLETHORA OF BENEFITS FOR PATIENTS

Telemedicine and remote patient monitoring have been shown to benefit patients^{10,11} by:

- Engaging them to better manage their own health and care
- Decreasing wait or travel time that would be required with an in-person consultation
- Improving patient knowledge, satisfaction and clinical outcomes
- Reducing hospitalizations, and healthcare costs
- Enabling better management of chronic diseases
- Increasing access to healthcare, tools and expertise (particularly in remote communities¹²)
- Reducing emergency room visits, severe illnesses, and deaths
- Decreasing embarrassment, discomfort or fear associated with in-person medical consultations.



PROVEN BENEFITS FOR EMPLOYERS

In a recent survey¹³, the majority of Canadian HR leaders have indicated that their top priorities were to improve employee engagement, employee recruitment and retention, and employees' mental and physical health. Employers must integrate innovative solutions into their employee health benefits to achieve these objectives and more. Telemedicine, and more specifically Dialogue, can help.

Attract and retain talent

As health benefit plans have become the norm for the majority of organizations, unique and innovative services like Dialogue can help with work-life balance, physical and mental health, support for families and more.

As a result, companies offering telemedicine stand out as employers of choice in a competitive market because they are able to provide numerous sought-after perks in a single solution.

With widespread consumption and adoption of technology by the great majority of the population between 15 and 64 years old¹⁴, consumer expectations evolve accordingly. It is therefore more important than ever to implement leading, tech-enabled programs and services that provide the convenience desired by the on-demand generation.

Preventive measure for STD, LTD and other claims

Dialogue provides additional services like mental health and nutrition services. By offering a holistic approach to virtual care, Dialogue's healthcare team can proactively address both physical and mental health issues that would otherwise lead to crises or short- and/or long-term disability claims.

*When employees can directly and significantly benefit, the **service is perceived as highly valuable** and employers are viewed favourably.*



PROVEN **BENEFITS** FOR EMPLOYERS

Reduce absenteeism and increase productivity

Absenteeism is a significant contributor to the amount of lost revenue and productivity for Canadian organizations and the economy as a whole. Although not as widely measured, presenteeism (employees who come to work sick, or suffering other conditions that prevent them from working productively) can also have a significant impact on productivity losses.

Telemedicine can help address intermittent absences related to certain medical episodes for employees and their family members, as the majority of primary care concerns can be treated virtually.

See happier, healthier people to increase employee engagement

Studies have demonstrated that health and wellbeing are inextricably linked. With 60% of employees not engaged at work,¹⁵ it is imperative for organizations to implement solutions like telemedicine in order to decrease engagement-related productivity losses.

9.3

Days of absence per employee per year¹⁴

6

Interactions with the healthcare system per year¹⁴

*Access to virtual care can not only **reduce time spent away from work**, but can also **minimize the personal and travel time** needed for an in-person medical consultation, thereby contributing to the **enhancement of employees' work-life balance**.*

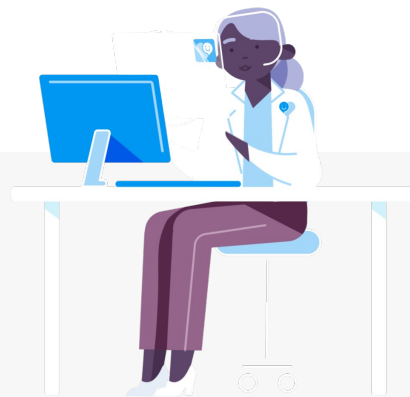
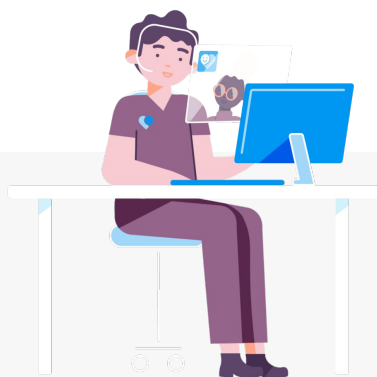


HOW DOES DIALOGUE STAND OUT?

While most virtual care providers purport to offer value in the same ways that we have outlined above, it's important to reiterate that Dialogue is the sole provider in Canada that has focussed exclusively on the B2B market to-date. This makes Dialogue uniquely positioned and more experienced in delivering and measuring value to organizations and plan sponsors via virtual care services as well as other specialized programs that were developed to respond to the needs of these employers.

In addition, being a service that emphasizes continuity of care, and more than just episodic healthcare, Dialogue is better positioned to deliver on the aforementioned value propositions compared to some of the more fragmented offerings that exist on the market today.

There are several factors to consider in the search and selection of the best telemedicine solution for an organization. Here are some of Dialogue's distinguishing factors:



"Dialogue is a concrete way to demonstrate to our employees that we are committed to their well-being. We improve their quality of life by giving them instant access to a medical team."

Claude-Antoine Tremblay

Director of HR — Coveo

HOW DOES DIALOGUE STAND OUT?

Multichannel and Multidisciplinary Medical Expertise

Dialogue is the only telemedicine provider that uses multichannel interactions (chat, calls and video) to communicate, letting patients decide which is most convenient for them. Dialogue is also the only provider that employs a diverse team that includes care coordinators, nurses, nurse practitioners, doctors and other healthcare professionals to treat the widest scope of cases possible and to offer appropriate auxiliary services (e.g. nutrition, psychologists, lactation specialists and more). This multidisciplinary approach helps support patients further and allows for prevention of chronic issues or longer term disabilities, thereby reducing health-related costs for employers.

Additionally, a rigorous hiring and training process is used to ensure consistency and best-in-class standards for quality, efficiency, knowledge and empathy in the medical services we provide..

Dialogue's in-house healthcare team helps deliver true continuity of care (with regular follows-ups and the ability to offer additional tests for example), which research indicates is optimal for long-term positive patient outcomes. Employers can rest assured their valuable talent is receiving premium healthcare.

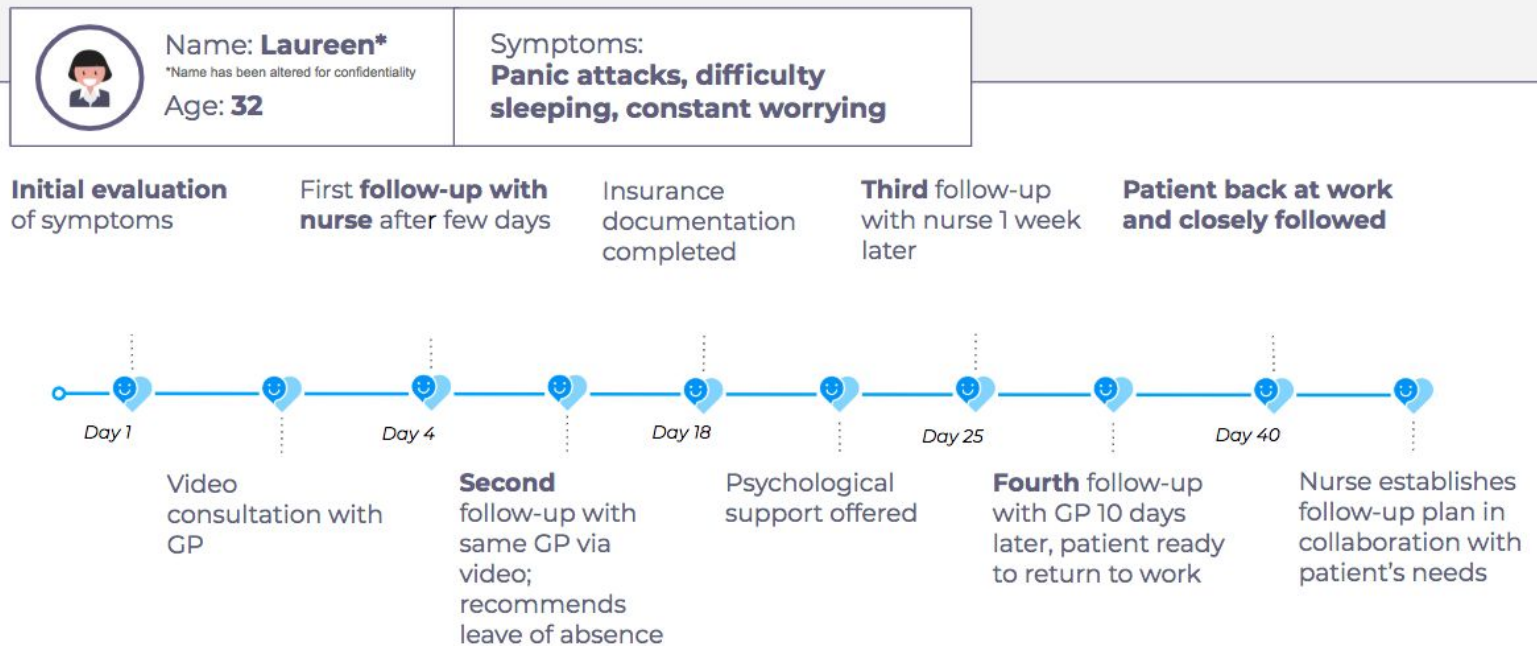


HOW DOES DIALOGUE STAND OUT?

Coordination and Continuity of Care

Dialogue offers to help patients navigate the healthcare system by organizing in-person or specialist appointments where most convenient for the patient. Medical follow-ups ensure continuity of care, adherence to treatment and improvement of symptoms to allow employees to either remain at work or recover more effectively, thereby reducing short- and long-term disability claims (see figure below).

Anonymized Mental Health Case (typical example)



HOW DOES DIALOGUE STAND OUT?

Vertically-Integrated Technology

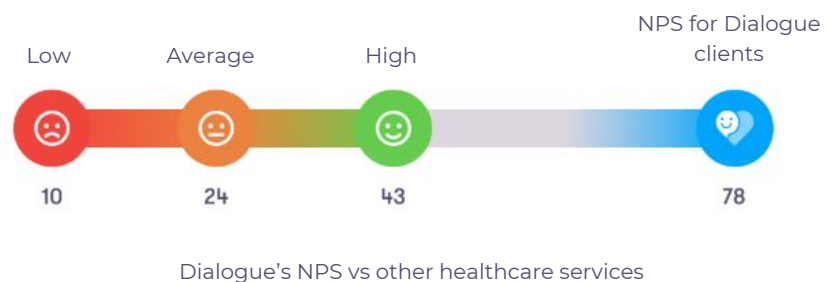
Equipped with the largest product and engineering team working at a Canadian telemedicine organization, Dialogue's proprietary technology allows for easy customization and evolution of services based on continuous client and patient feedback. This also enables Dialogue to scale to support any large partnership and to have the flexibility to meet the needs of a rapidly-growing client base. In addition, Dialogue complies with all privacy laws and regulations and holds enterprise-level security certification to assure that we safeguard patients' information.

Unparalleled Client Satisfaction Rate and High Member Engagement

Several reporting measures are available to track client and patient satisfaction levels and Dialogue's results are consistently very high. In line with Dialogue's customer-centric approach, an entire customer success team is dedicated to onboarding, training, supporting, reporting and creating awareness. This allows for the increase in adoption of Dialogue's services and to ensure the highest standard of service is received. With this customer success team in place, Dialogue is a turn-key solution with minimal administrative work required on the client's part.

How likely are companies to recommend Dialogue to other businesses?

The Net Promoter Score (NPS) is a satisfaction metric that allows an organization to measure how likely a company is to recommend their service to another business.



WHAT TO LOOK FOR WHEN SELECTING A TELEMEDICINE PROVIDER?

Due to a growing number of virtual care providers in Canada, it's essential to identify the most complete offering that will fit with your organization's needs and your employees' expectations.



With the continuous evolution of technology and significant investments made to grow Dialogue, we are confident that our services make life better and positively impact the health of your employees, their families, and your business. Contact us for a demo or to learn more! We look forward to demonstrating how we can help your organization and your employees.

[Contact Us for a Demo](#)

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