

Roles, opportunities & challenges of Telemedicine in Covid-19 pandemic

June 30th, 2020

Overview

Easy life

More difficulties

Old Normal

Transition

New Normal

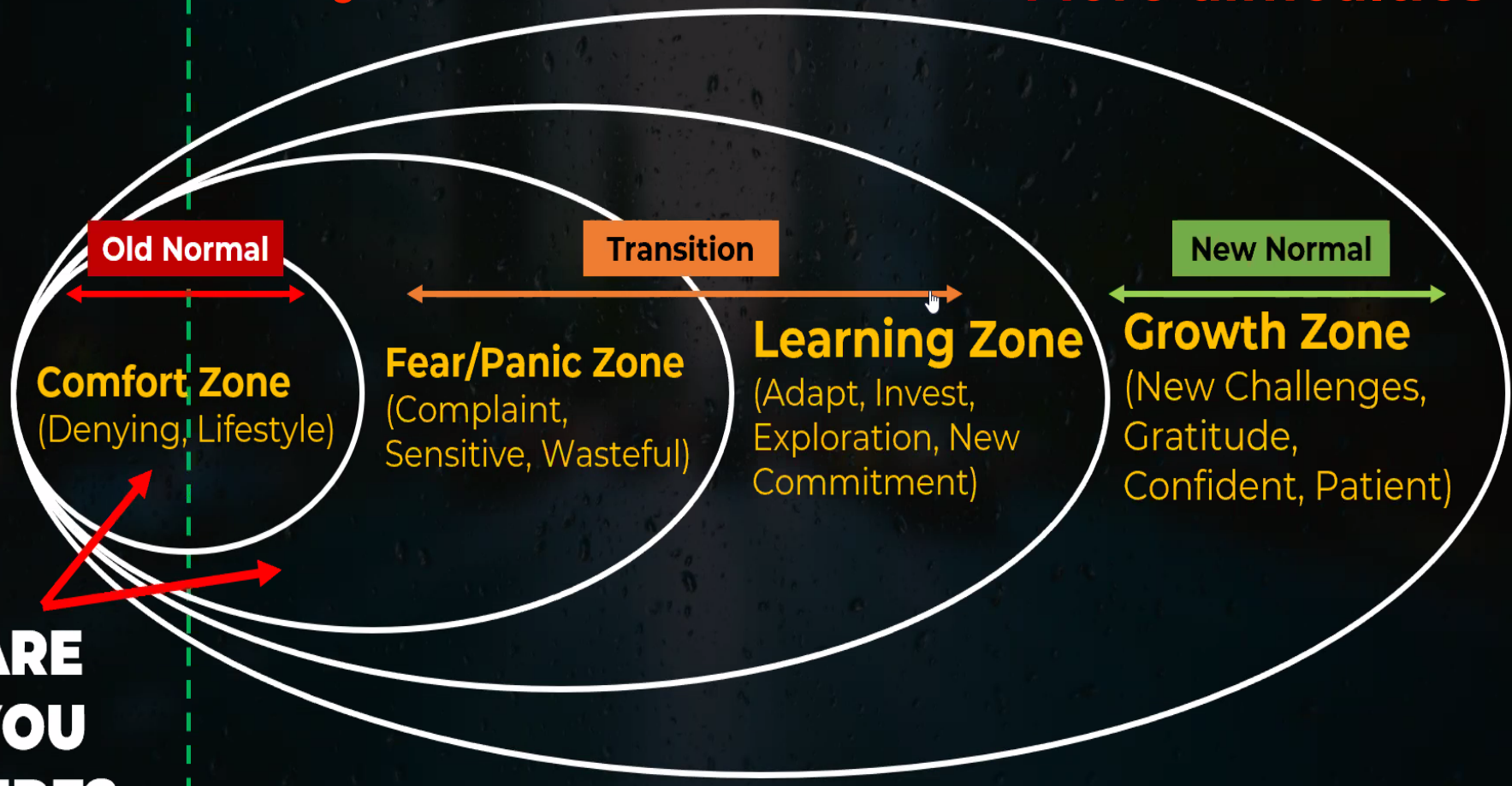
Comfort Zone
(Denying, Lifestyle)

Fear/Panic Zone
(Complaint, Sensitive, Wasteful)

Learning Zone
(Adapt, Invest, Exploration, New Commitment)

Growth Zone
(New Challenges, Gratitude, Confident, Patient)

ARE YOU HERE?



TREN DUNIA KESEHATAN POST-COVID 19

1. Dukungan terhadap Tenaga Medis Meningkat, Tetapi Masyarakat Takut Terhadap Rumah Sakit (60% Pendapatan Hilang)
2. Customer Experience Through Digital Technology (The Journey Start From Online Service)
3. Mental Health:
 - **Post Traumatic Stress Disorder**
 - **Agoraphobia** (Cemas dalam keramaian)
4. Flexible **Health Infrastructure**
5. Home-Based Care (Diagnostic & Medical Action)
6. Fokus pada **Preventif, DIY, Convenience Services**

The impact of COVID-19



Change in communication/ information channels

- HCP training
- Telehealth virtual care at scale
- Virtual rep visits



Change in techniques & use of data

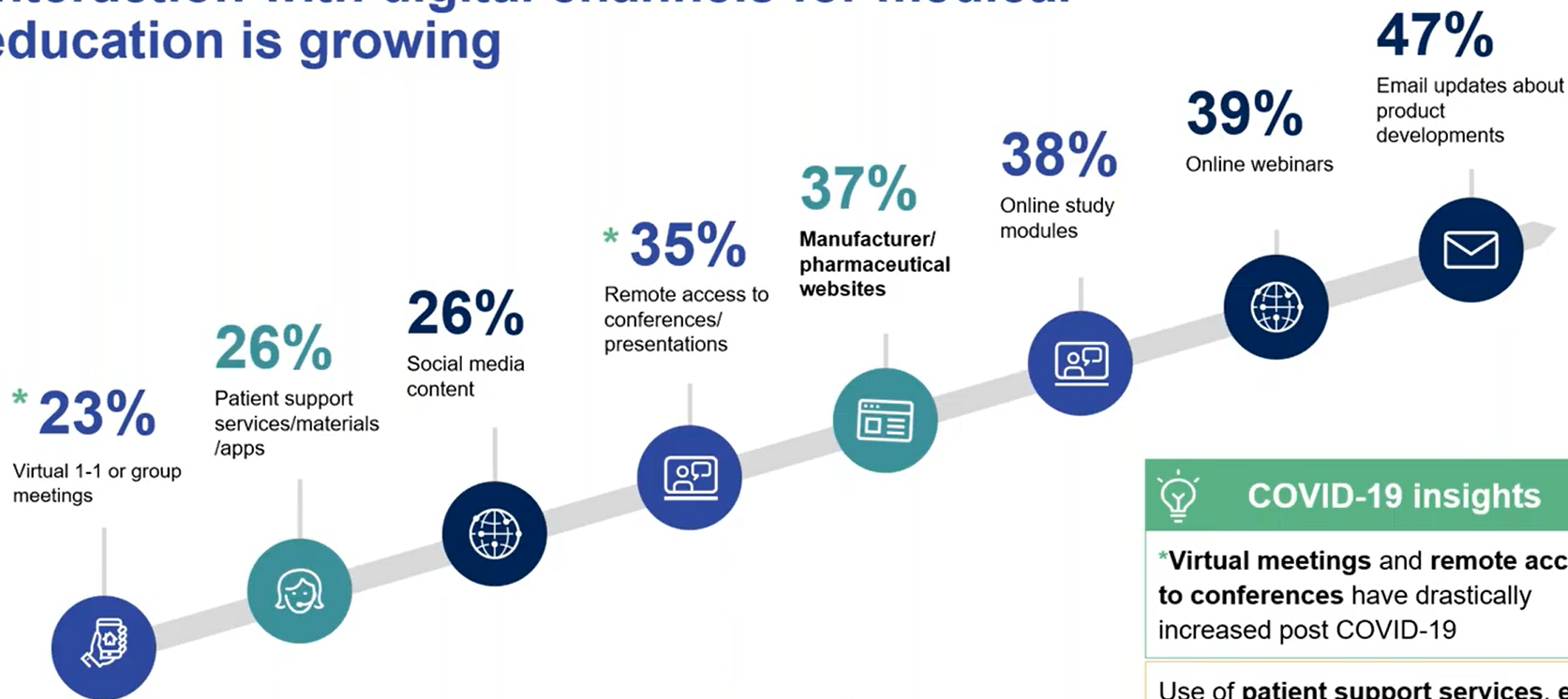
- Fast track of new technology, e.g. AI and mixed / virtual reality
- Global population health data




Change in attitudes

- Reluctance to seek treatment during COVID-19 pandemic
- Acceleration in reform for digital health policy

Interaction with digital channels for medical education is growing



 **COVID-19 insights**

***Virtual meetings and remote access to conferences** have drastically increased post COVID-19

Use of **patient support services, email updates** and **online study modules** have also increased

China continues to lead the world in telehealth

96% of HCPs know of telehealth

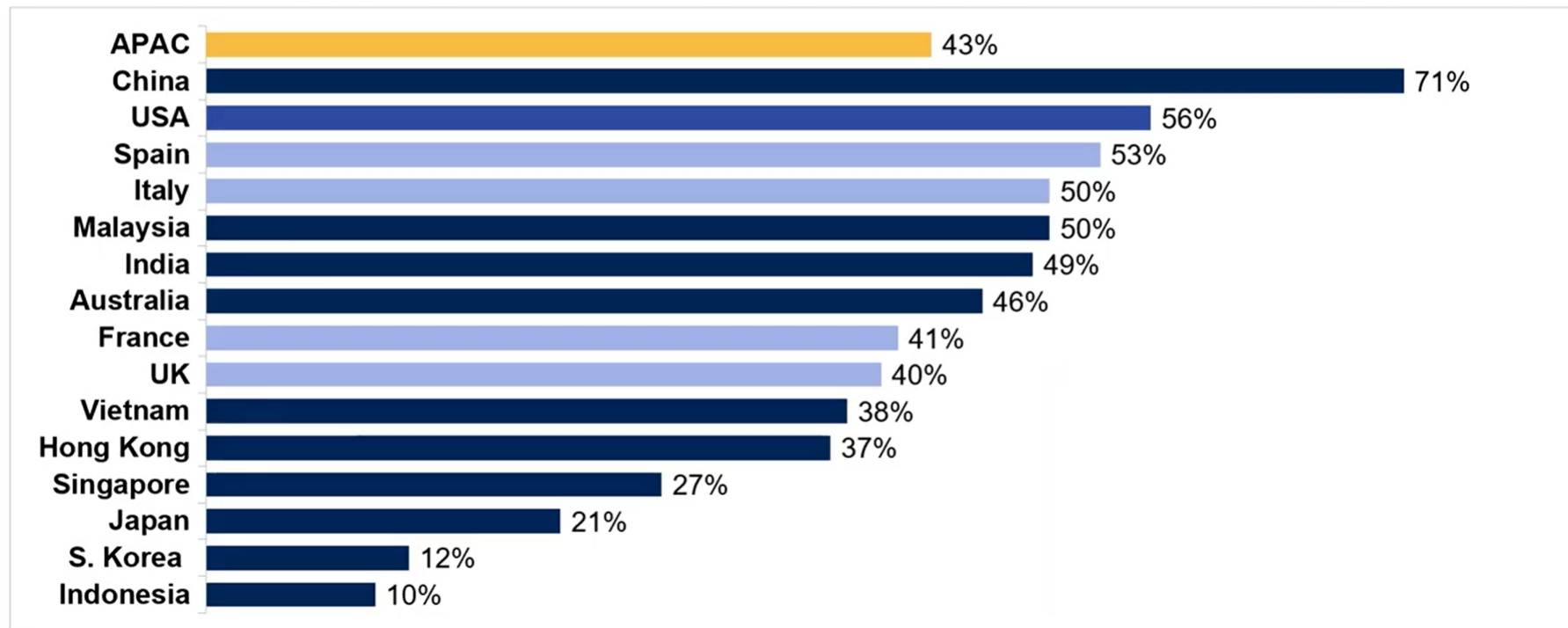
87% of HCPs have used telehealth at some point

66% of HCPs are currently using telehealth

Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 676 PCPs across 9 countries



China was the lead market in terms of recommending connected health devices to patients for review in consultations



Source: Q5. In the past year, which of the following, if any, have you recommended for your patients?

Base: All respondents (n=1745)

Challenges & Opportunities

Telemedicine Today



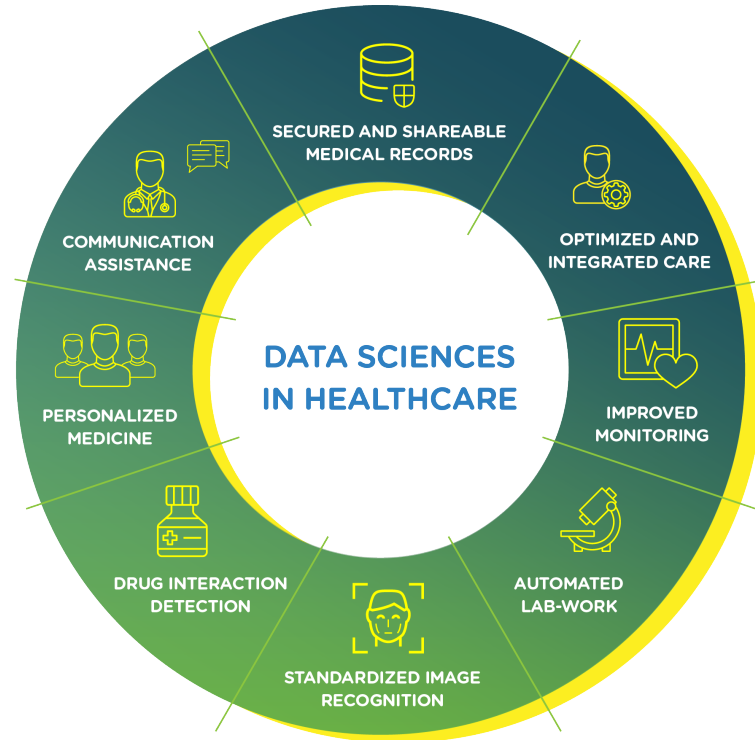
Perspective
from consumer
internet



Doctor's
Perspective



Consumer's Perspective





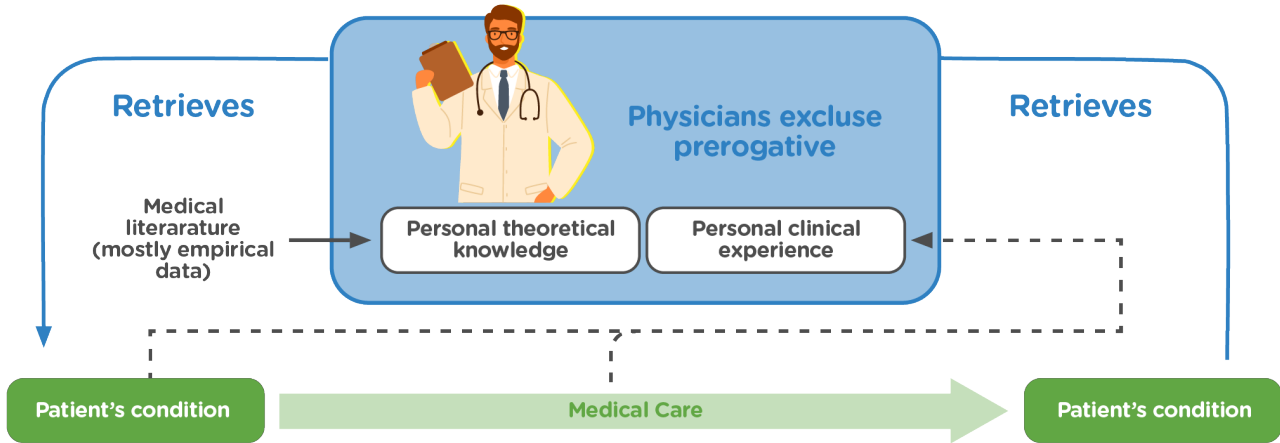
CONSUMER BEHAVIOUR

CONSTANT BEHAVIOUR	OPEN-MINDED BEHAVIOUR	UNCERTAIN BEHAVIOUR
<p>People buy the same products</p> <p><i>Past 1950</i></p>	<p>People are trying new products, and begin to buy more</p> <p><i>1960-2000</i></p>	<p>People don't know what to buy because they have to many options</p> <p><i>2000-present</i></p>
<p>Finding balance after two World Wars</p> <p><i>Past 1950</i></p>	<p>Exponential growth of World Population</p> <p><i>1960-2000</i></p>	<p>Fast evolution of technology</p> <p><i>2000-present</i></p>
<p>Political Polling Advertising Studies</p>	<p>Surveys Focus Groups Interview</p>	<p>Observation Online Surveys Big Data Neuromarketing</p>
IS IT HAPPENING?	WHAT IS HAPPENING?	WHY IS HAPPENING?

Doctor's Perspective

1

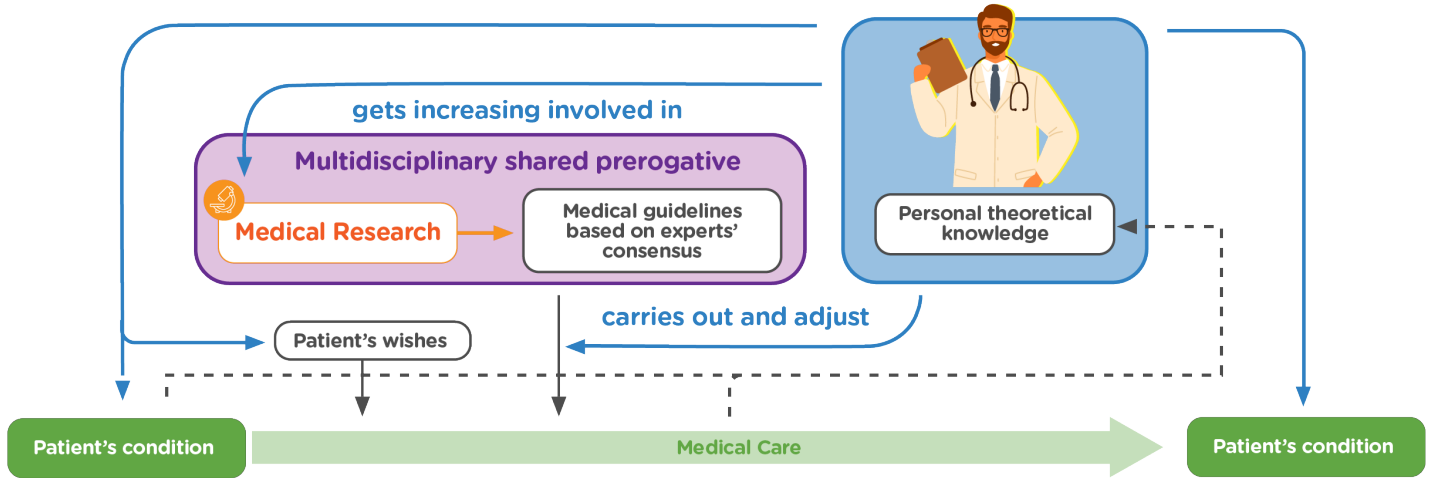
Medical Paternalism: remained predominant up until the 20th century



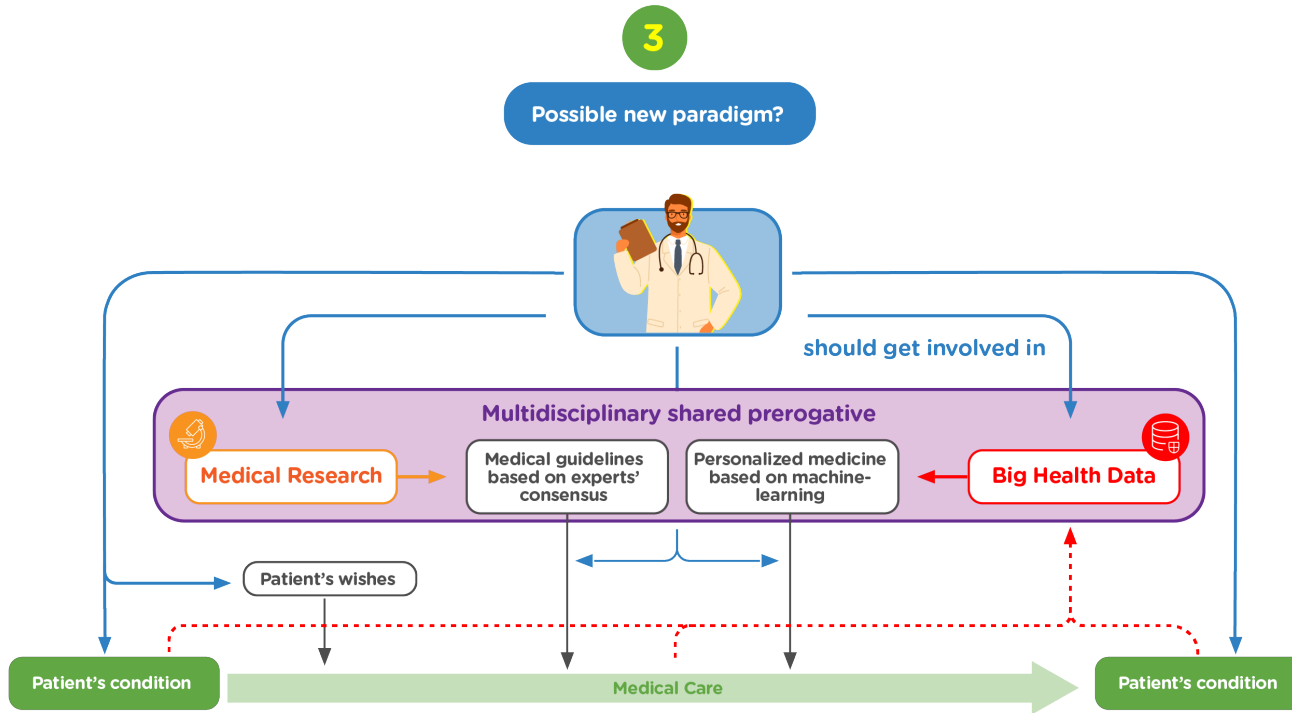
Doctor's Perspective

2

Evidence-based medicine: prevails since the late 20th century



Doctor's Perspective



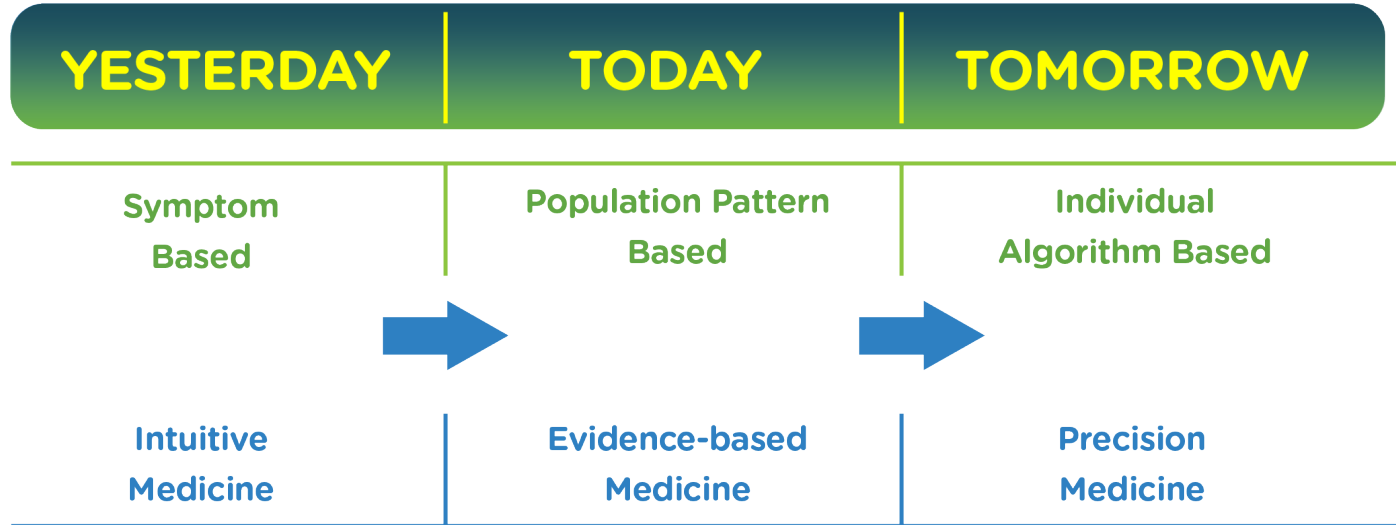
Model 2 dan 3 tidak dapat dipisahkan, karena ilmu kedokteran merupakan gabungan *science* dan *art*.

Manusia merupakan suatu eksistensi yang penuh dengan variasi, yang secara program tidak dapat diprediksi 100%, karena program berasal dari hasil penelitian/konsensus ahli di lapangan. Berbagai variasi normal dan variasi dalam kondisi abnormal, kondisi atipikal dan tidak khas, tidak dapat diselesaikan dengan algoritma semata.

Peran teknologi dan data harus dapat dipahami sebagai alat untuk membantu dan mempermudah dalam proses pelayanan medis.

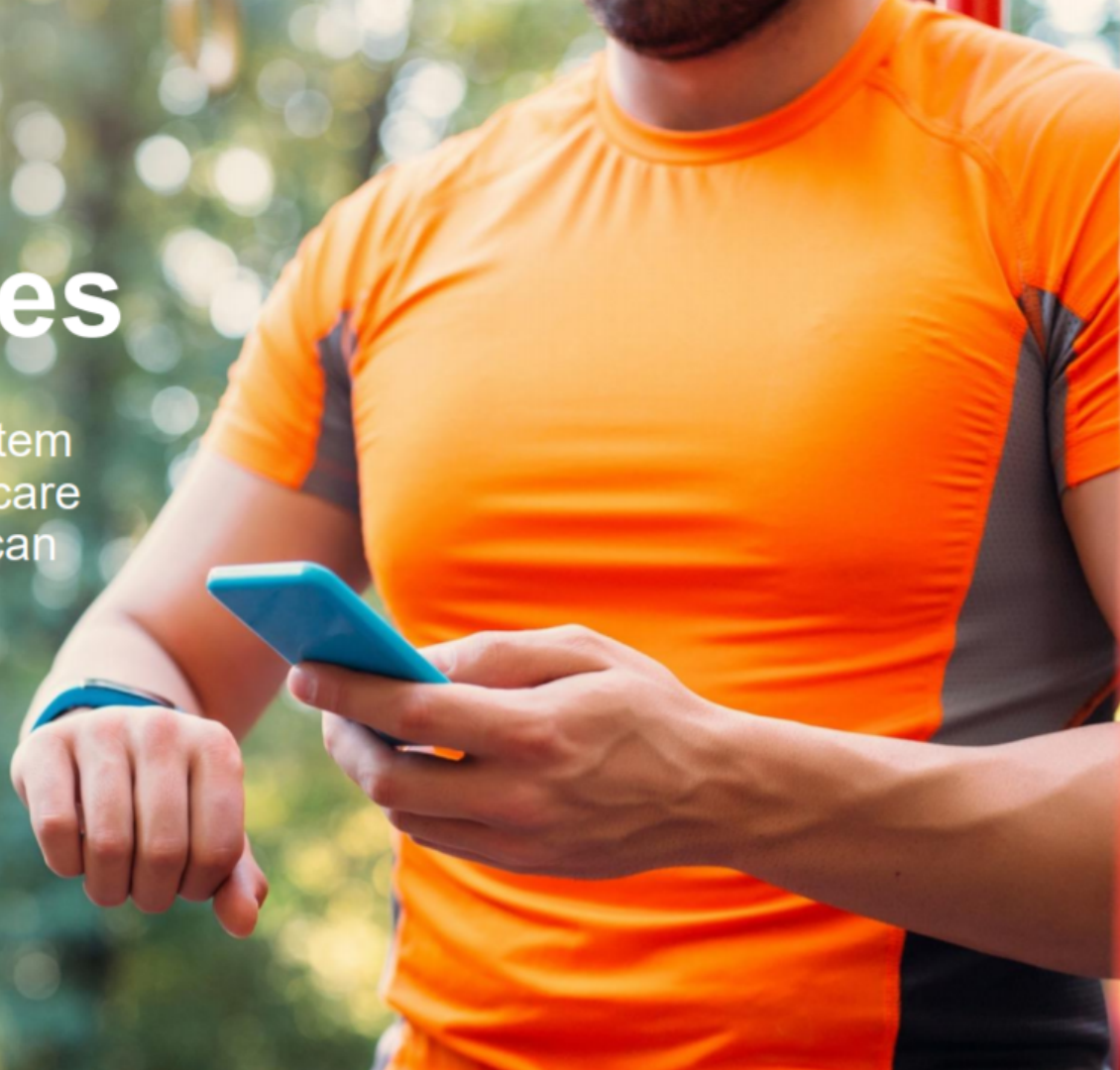
Contoh: Penggunaan AI untuk *virtual assistance* tidak dapat menggantikan sepenuhnya layanan kesehatan, tapi dapat membantu praktisi medis untuk mempermudah proses awal yang rutin dan wajib dilakukan (misal: anamnesis sederhana) untuk menajamkan diagnosis dan membantu praktisi medis untuk berfokus dalam menangani masalah yang lebih kompleks.

Contoh lebih jauh lagi adalah penerapan data pada dunia genetik dan penelitian untuk *personalized/precision medicine*.

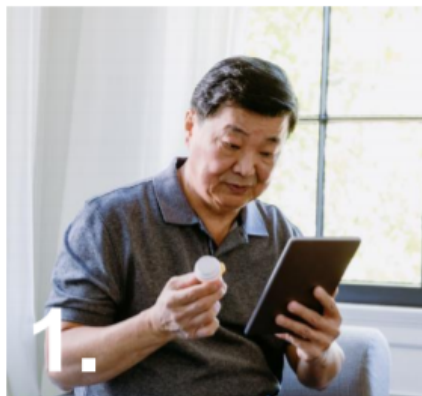


Healthier Lives

as individuals take better care of themselves outside the health system grows, we explore the rise of self-care and the enabling role technology can play



The rise of digital and connected health



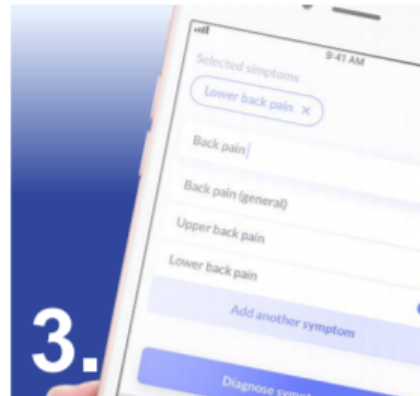
1.

Telehealth/virtual care visits at scale



2.

Self-testing and Personalized care



3.

Triage chatbots and wearables

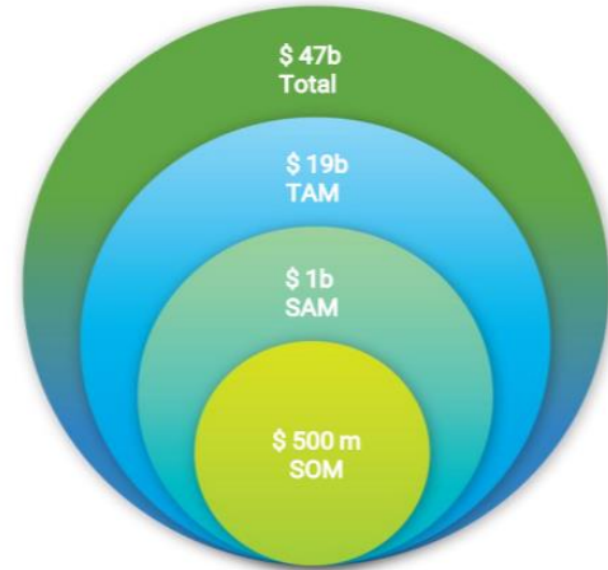


4.

Global population health

Huge & Growing Market: \$47 Billion Total

- Old ways of delivering healthcare is ripe for disruption and will slowly phase out because of:
 - consumerization of healthcare, new innovative models for healthcare access & services, and pervasive penetration of affordable devices
- E-health is predicted to grow substantially from virtually non-existent today. It transcends beyond our 5 revenue streams to many greenfield areas e.g. AI, EMR, HMIS, Wearables, Lab-as-a-service and homecare.
- It is therefore necessary to acquire customers quickly and develop the technology & products for a new era of healthtech



KlikDokter is Fully Supported by Kalbe's Prominent Ecosystem



1. Nationwide & complete penetration to largest population of doctors, pharmacies and healthcare facilities
2. Established retail distribution and multi customer contact points
3. Preferred access to wide variety of patented and generic medicines, OTC and supplements

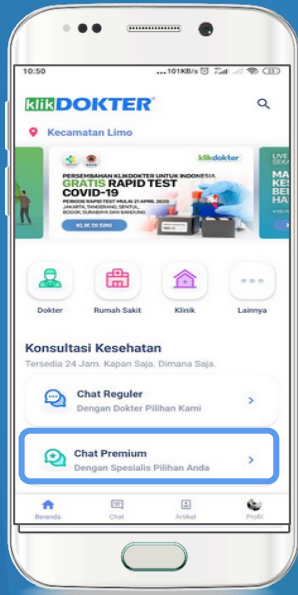
WITH MORE THAN 168.000 DOCTORS ALL OVER INDONESIA, WE COVER

- 70% of GP Market
- 90% of Specialist Market
- 100% of all Hospitals
- 100% Pharmacies
- 6.93 Mio Nutrition Customer



- 2 Regional Distribution Centers (RDC)
- 74 Branches
- >133.000 Pallets
- >200.000 Outlets

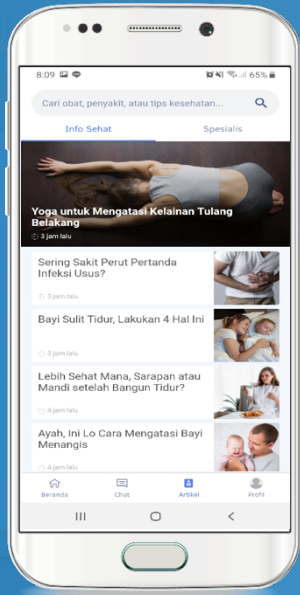
KlikDokter Apps Features



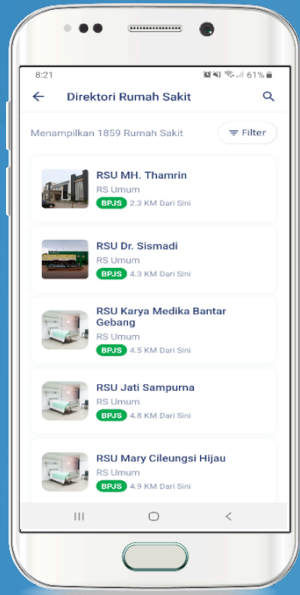
Home Page



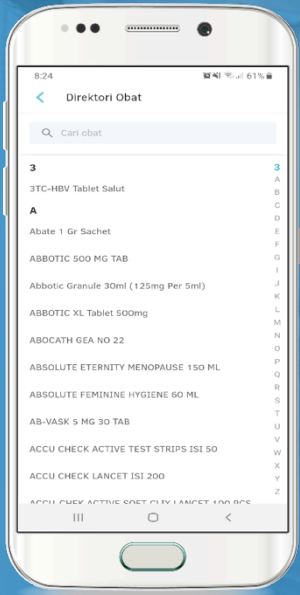
Online Consultation



Health Articles



Doctor, Hospital & Clinic Directory



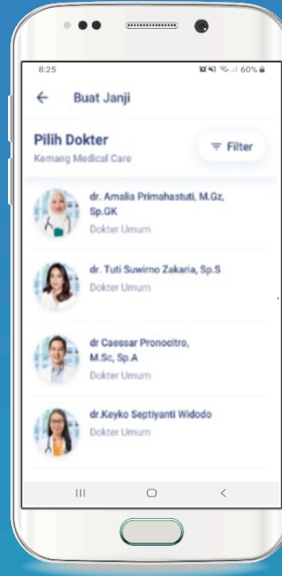
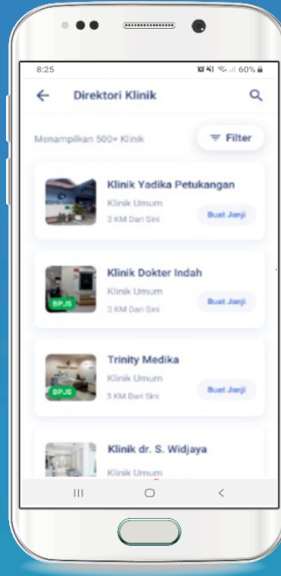
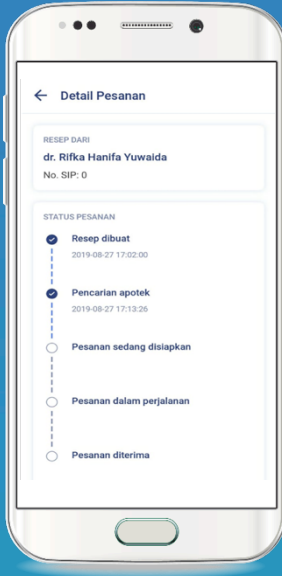
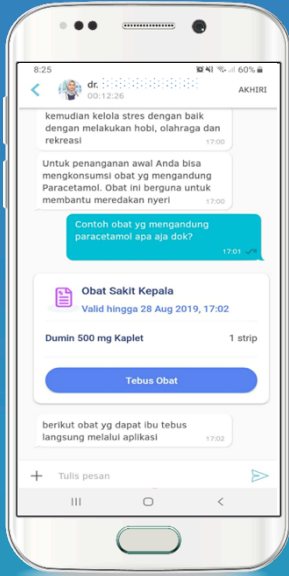
Medicine & Disease Directory



Health Tools
• Pregnancy Calendar
• Fertility Calendar

KlikDokter Apps Features

klikdokter



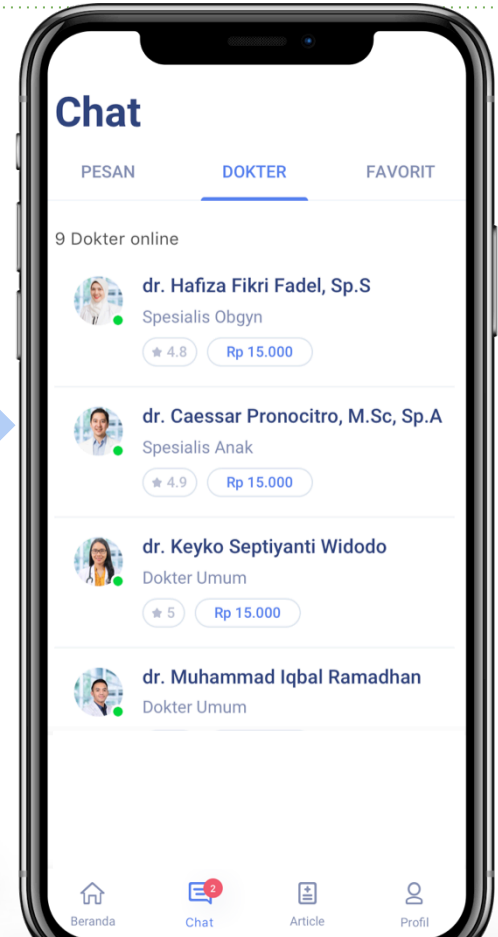
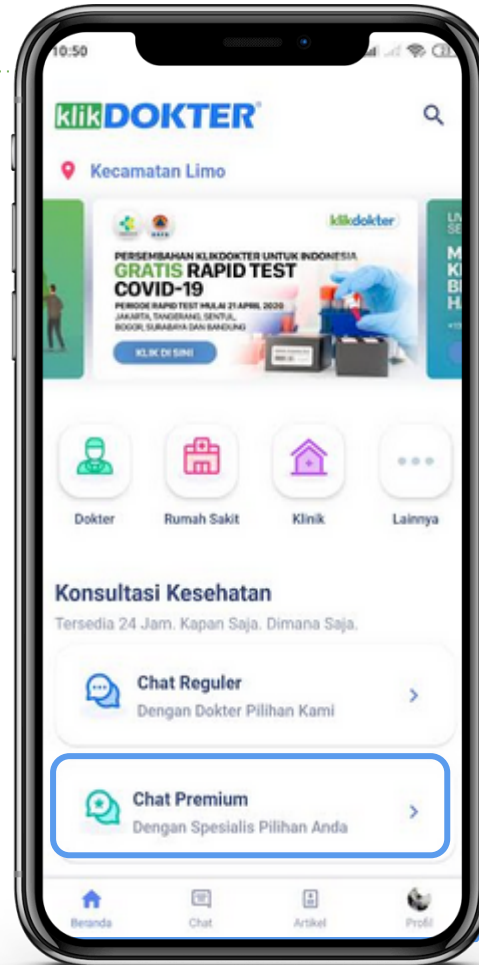
Online prescribing & Medicine Delivery
(Jabodetabek)
Medan, Bandung, Semarang,
Yogya-Solo, Surabaya

Medical Reservation

Online Consultation

1. Chat consultation with private room with doctor
2. Can share files/ videos on chat room

Feature	Reguler Live Chat	Premium Live Chat
Limit consultation per day	✓	Unlimited
Chat duration	15 minutes	30 minutes
Choose doctor	x	✓
Specialist doctor	x	✓
Fee	Free	Paid



- 1. The drug can be taken at a selected pharmacy (pharmacy in hospital/clinic).**
Manual delivery by hospital / clinic
- 1. Or the drug can be taken at a nearest pharmacy to patient's location.**
Automatically delivery by Grab Express (limited delivery area in Jabodetabek, Bandung, Medan, Semarang, Yogya, Solo, Surabaya)
- 1. Payment by OVO & DANA, Go-Pay, Bank Transfer, Credit Card**

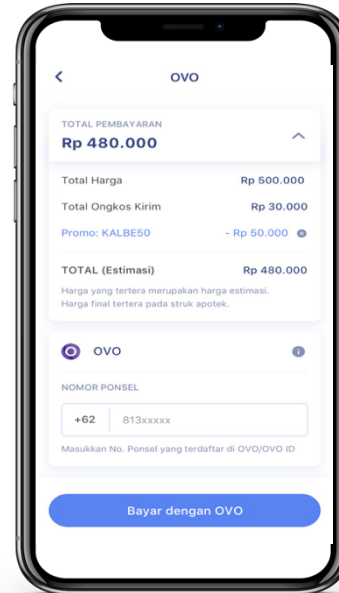
Prescribing on Chat



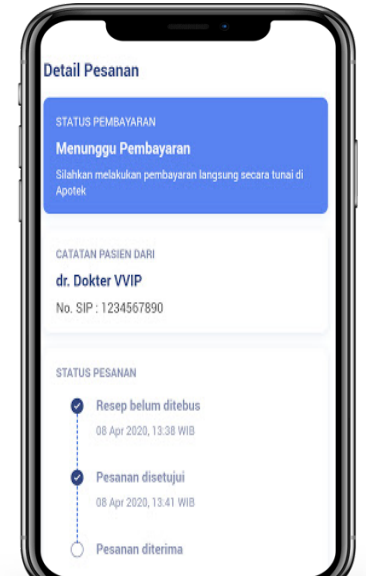
Redeem prescription on user view



Digital payment on user view



Prescription status



OUR SERVICES

E-Prescription

Doctor can give e-prescription or medicine recommendation (if needed) to users via live chat. If user click “Tebus Obat”, the medicine will be pick up from the nearest pharmacy, around the user house.

>10,000 patients/Day



>500 e-Prescription/Day

>500 medicine delivery/Day (JABODETABEK area, JAVA Island, Palembang, Medan, Pekanbaru, Makassar, Denpasar with free shipping)



Dr. Ali Parsa
Chief Executive Officer



aws SUMMIT
LONDON

Thank you.