How to identify unmet needs in eHealth

get

Delivering growth
to eHealth business

Executive summary

An *unmet need* is a problem, bottleneck or desire of functionality with no current good solution in the market or at an affordable price. It is a market gap that could be exploited to start a profitable business around it.

This document aims to support entrepreneurs and Small and Medium Enterprises (SMEs) to identify unmet needs in eHealth following a demand driven approach. That is, systematically interacting with customers and users to detect areas of opportunity.

It shares the experience collected during the execution of GET, a project funded by the European Commission, which delivers services to support eHealth entrepreneurship. In particular, the *Fill the Gap* service (also known as *GET inspired*) has tested several methods to identify unmet needs. These methods are outlined in this document, together with insight, references and general lessons learnt by the project consortium. It also refers to the list of unmet needs in eHealth already identified by the service.

Finally, it suggests next steps to respond to promising unmet needs, and the further support the GET project can provide.

Motivation and context
So you want to make a difference.

If you are reading this document we expect that you will promote projects in Health that make use of Information and Communication Technology (ICT) to support patients, citizens, healthcare organizations and professionals. That is, helping people with Health issues to live better and longer lives.

The concept ICT for Health, has many labels: eHealth, Digital Health, mHealth, health 2.0, telemedicine, etc. However, rather than definitions and labels, what is critical is to realize that it is at the intersection of two very (very!) different cultures: Health and ICT. The mind-sets, approaches and priorities are often poles apart when actors from both sides - healthcare professionals and technologists- jointly try to solve the same problem. And that is only when the problem is identified and agreed.

But, how is the problem identified in the first place? When entrepreneurs decide to launch an eHealth project, where do they get the idea from? How do they identify a need in the market that is not properly addressed and worthy of pursuit?

A lot of Digital Health projects are based on sound patient or healthcare organizational needs. Some of them are even promoted by healthcare professionals or patients themselves. Others with enough financial resources carry out a thorough market analysis exercise that highlights business opportunities.

However, there's still a percentage of Digital Health initiatives that follow a technology-driven approach. The typical set up is a group of technologists, skilled in a particular technology (Google glass, 3D printing, etc), looking for a problem to solve. And what better area than Health and the chance to help patients? They look to the current way of doing things in traditional Healthcare settings, identify inefficiencies, and unilaterally decide to develop a solution using that technology.

For good or bad, most of this type of initiatives fails. Apart from the typical hurdles associated with Healthcare procurement, long selling cycles, regulation and interoperability, they usually face a very fundamental problem: there is no critical need. Solutions developed this way tend to be *nice to have* rather than a *must have* compared to other problems, bottlenecks and inefficiencies that truly have an impact on organizations and users. Earlier consideration of the "critical need" or "must have" factor would avoid time and resource investment in such solutions.

This scenario is not exclusive to young entrepreneurs with little business experience in the sector. Sometimes seasoned professionals are fascinated with the possibilities of a brand new technology, perhaps used successfully in another sector.

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Their enthusiasm and the technology push can sometimes take precedence over gaining an understanding of the unmet need itself.

At the same time, there are interesting areas in Health for entrepreneurs, where important needs are underserved and ICT can be used to solve them. Despite Health being a discipline so intensive in information and knowledge, it is still lagging in the use of ICT tools that facilitate their capture, management, analysis and sharing.

Besides, global trends like aging populations are changing the system focus from acute to chronic diseases, opening up new opportunities. Same for the use of genetic data for personalized medicine. Regarding the issue of the increasing cost of Healthcare, the move of some countries (eg. the USA) from fee-for-service to pay for performance reimbursement models may have a global impact on the adoption of digital technology.

The key is identifying those areas first, and then using ICT to develop solutions. These opportunities are best spotted by the people experiencing the current system who can identify the gaps in service provision. We call them "unmet needs".

With this context in mind, a consortium of European eHealth organizations has been working on several methodological approaches to systematically identify unmet needs in Health that can be solved with the use of technology. The work has been carried out under the **GET project**, funded by the European Commission, in particular via the execution of a service called **Fill the Gap**[1] (also known as **Get inspired**).

This document describes the methods tested within service to identify unmet needs together with resources and lessons learnt. The GET team can also provide further support to help entrepreneurs, SMEs and other actors to spot areas of opportunity for their next eHealth project.

[1] http://www.get-ehealth.eu/fill-the-gap/

Objectives
and key message

The main objectives of this document are to:

- Make aware and stress the importance of following a demand-driven approach versus a technology push when identifying business opportunities.

- Share the experience within the GET project to support unmet need identification.

- Promote successful entrepreneurship by disseminating the initial list of opportunities already identified within the service.

- Foster collaboration between the GET team and other actors looking for business opportunities in eHealth.

Its **key message** is:

Avoid the technology push and listen to what customers really need

What is an unmet need?
and how to identify them

For the purposes of GET an unmet need is similar to a market gap. That is, a problem, bottleneck or desire of functionality with no current suitable solution in the market or at an affordable price.

A selection of unmet needs identified by the GET project are:

- Affordable, effective and scalable solutions for treatment adherence.
- Support the management of screening requirements and test results for cancer patients.
- An intuitive tool that calculates carb to insulin ratios advising on next best steps, giving feedback on how proper maintenance clearly improves the health of diabetic patients.
- A support package for pain management – improving upon what is already available.
- Help to manage a personal mental health crisis.
- Feedback on how treatment, care and lifestyle changes impact on health and wellbeing.

In addition to the descriptions above, the GET inspired service provides background information and current solutions that somewhat address each need. This information together with the full list of needs can be accessed following this link: www.get-ehealth.eu/fill-the-gap/full-list-of-needs/

This section describes some of the methods used within the GET project to collect qualitative and quantitative information on unmet needs. The list of methods is not exhaustive and could be supplemented by further data collection methods.

Some prior consideration though. Consider your target market and customer when planning stakeholder consultation to identify unmet needs. For example, the traditional ICT for Healthcare market can be considered very competitive due to the number and maturity of competitors, but the business approach is quite straightforward. On the other hand, developing solutions for patient self-management of disease is becoming a field of great opportunity (a "blue ocean"[2]) but business models can be challenging.

So you may want to start with initial desktop research regarding prevalence of conditions or relevant trends (eg aging populations, changes in reimbursement or legislation, etc.) in advance of your stakeholder consultation.

[2] http://en.wikipedia.org/wiki/Blue_Ocean_Strategy

What is an unmet need?
and how to identify them

The approaches used by GET to identify unmet needs included:

1. **In depth interviews**. One to one exchanges with stakeholders knowledgeable in the market. For instance CIOs or Medical directors; clinical opinion leaders or patient association representatives. The advantage is that you obtain very deep knowledge, and potentially a partner or at least an advisor. You will need to confirm the insights with a wider audience to validate them.

2. **Focus groups**. A focus group is a form of qualitative research in which a group of people are asked about their perceptions, opinions and beliefs. It identifies and prioritizes unmet needs common to several people at the same time, but has to be properly conducted to avoid contamination of opinions and requires a logistical effort to physically bring together the group.

3. **Unmet need corner**. This approach aims to take advantage of relevant (eHealth) events to capture information, while minimizing the logistical overhead of contacting and visiting time-pressed stakeholders. Attendees of the event are asked to propose needs, using an innovative visual format to attract attention. It requires coordination with the event organizer and pro-

activity to motivate participation of the attendees.

4. **On-line surveys.** Web tools can be a relatively economical way to collect feedback from a wide audience. Both structured and unstructured information can be easily managed and analysed by the web tools. However, information has to be very clear to get valuable answers.

5. **Third party challenges**. Related to Open Innovation[3], a paradigm that assumes that firms can and should use external ideas as well as internal ones. In this case the need is already identified by a sponsor organization seeking solutions. Interested solution providers submit proposals and a selection process takes place so one of them is awarded. Apart from cash, visibility and recognition, participants winning the challenge may also get a partner to support making the idea a reality. Competition tends to be tough in these challenges.

6. **Informal exchanges.** Note that unmet needs can also be identified through informal exchanges e.g. conversations in the workplace, reading the news etc.

A detailed description of these methods will be available soon at the GET web site.

[3] http://en.wikipedia.org/wiki/Open_innovation

Overall lessons learnt
when identifying unmet needs

Find below some of the general insights acquired while identifying unmet needs for the FILL the Gap service.

1. The earlier you narrow down your market the better

The Health market is vast and you cannot solve all problems. Firstly, select a specific area, with the right granularity for your ambition.

When in doubt, narrow down options using business criteria, for example by market size (major chronic conditions like Heart Failure, Diabetes or COPD). Also, try to identify global problems –versus local ones- that will let you expand geographically (for instance within GET we have identified Treatment Adherence[4] as a promising area).

Be aware that if you target the traditional Healthcare market, this is a highly competitive environment with a lot of players including big multinational companies. Even if you are addressing a new niche of functionality, you are all competing for the same customer´s budget. If you are a start-up it will be unlikely that you can participate in large public procurement contracts only by yourself, since your company probably needs to be certified. It is not impossible though, and there are plenty of success stories. It helps if you know how to navigate the system.

[4] http://www.get-ehealth.eu/fill-the-gap/needs/treatment-adherence/

Thanks to the popularity of smart phones, there are new opportunities in Health by delivering solutions (eg. Apps, wearables) directly to patients. This can be understood as a "blue ocean" compared to selling to healthcare organizations. Having the right business model and marketing are fundamental for success in selling directly to consumers. Health stakeholders like Pharmaceutical companies or pharmacies could be an option to economically support these new business models.

2. Commit, go out and get your hands dirty

In order to have results sooner rather than later, you should pro-actively work on your unmet need identification efforts. Commit yourself and organize your agenda to start executing. To speed things up, you may consider collaborating with partners that complement your skills or networks. For instance patient associations, scientific societies, organizers of events, etc.

Spread the word and let your contacts know what you are looking for, so they can also help you.

3. Master the art of listening

It is not about what you think. You are not in selling mode. You should be an active listener and identify what truly matters to the others. Do not to try to convince them or dominate the talk. Be an active listener that truly understands the signals

that they are sending to you, both verbal and non-verbal. Avoid the technology push. Prepare your script with sharp questions that focus on identifying needs and opportunities.

4. Be clear about what you want from stakeholders

Do not expect people will know right away what you mean by "unmet need identification". So devote time to make sure that they understand what you are looking for. It may help to prepare some examples to give hints about what you expect. But be careful not to-influence your stakeholders with the examples you give them.

5. Differentiate between a need and a solution

Henry Ford said: *"If I had asked people what they wanted, they would have said faster horses."*

In some cases, current solutions can be so deep-rooted in the market that efforts are focused on improving them rather than looking for disruptive alternatives. Therefore it is important to focus on the critical need and respond to this without being influenced by existing solutions.

One good practice is to specify the need without referring to technology. This helps to maintain a focus on the need.

6. Provide context when you ask

The concept of *unmet need* in Health means different things to different people depending on their market knowledge and experience. As a consequence, some inputs may not be so useful to your objectives, as they may be too vague or just express very high-level wishes. This is especially true when you ask open questions using on-line channels, rather than physical meetings in which they can ask for clarifications on the spot.

So when asking questions on-line, it is important to provide enough context about the motivation and the intended use of the information, so respondents can reply with valuable insight. However, there is a trade-off between giving enough information and not delivering too much text, as some people will then not reply.

7. For good quality, quantity is relevant

Building on the previous point, it is always better to collect a lot of answers and then assess, filter and prioritize them. It is safer to assume that only a (small) % of the feedback will be of real value, so several interactions should be planned to increase the chances of identifying quality unmet needs.

8. Watch out for unmet needs in all your interactions

Informal exchanges can identify unmet needs e.g. casual conversations with the healthcare workers and stakeholders, attending presentations or events or when reading the news.

What to do next?

Once you have identified a promising unmet need, these are a number of questions you should answer before launching your business:

Are there already solutions in the market that solve the need? Is it really unmet? Don't depend on search engine results of keywords - current solutions can have names or acronyms you are not aware of. Contact people in your sector that have a good overview, like associations or organizers of events.

Is the market you are targeting big enough? Do some market research and estimate its size and potential growth. If too small, it will be hard to make profit as the commercialization efforts may cost you more than the expected turnover.

Does the market really need it? Do a wider market validation, especially if you have identified the need by only contacting a limited number of people. Get as much early feedback as possible from users and customers and identify if there is a critical need.

If the answer to these questions is positive, then you have a market opportunity. In this case, start thinking about the business model and your team before you start writing code. For guidance, get familiar with methods that will help you drive your entrepreneurship project, like Lean startup[5] or eHIX[6]. You can find a useful example of business model testing

and pivoting in this video[7].

Also, avoid developing your solution in isolation and interact early with your users and customers. Some methodologies, like co-creation[8] and design thinking[9], can help you in the process.

You can also contact the GET consortium to support your Business Modelling and Commercialization strategy under the GET on Track service.

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[5] http://en.wikipedia.org/wiki/Lean_startup
[6] http://www.get-ehealth.eu/repository/
[7] https://www.youtube.com/watch?v=rS6fHW9pRek
[8] http://en.wikipedia.org/wiki/Co-creation
[9] http://en.wikipedia.org/wiki/Design_thinking

About the project

The GET project delivers four high-impact services to eHealth SMEs and entrepreneurs in order to boost their growth and move them to the next level of competitiveness.

Each service has been designed to provide cross-border value to a different target group of companies. It will do by offering training, mentoring, market intelligence, support and, above all, quality contacts.

These services are:

- **Get on track** Targets early-stage companies, start-ups and entrepreneurs. It supports them to optimize their business model and commercialization strategy.

- **Get funded** Designed for SMEs looking for a second round of funding. It provides training, resources and networking opportunities with investors at European level.

- **Get global** Helps mature SMEs to access international markets by putting them in contact with foreign commercialization partners and potential customers.

- **Get inspired** Identifies and disseminates unmet needs in eHealth that can become business opportunities for entrepreneurs and SMEs.

If you want to know what GET can do for you, suggest resources or insight

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