

## Calling the Shots: New Customer Roles in a Reshaped Healthcare System

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It's humbling to imagine what a poor job of forecasting the healthcare future any of us might have done 100 years ago -- or even 50 -- if we'd been pressed to project the state of medical affairs in 2011. But looking ahead is an essential part of what we do in our business -- however challenging it may be -- and as we look ahead to the next decade, there are three predictions we can make with conviction. The trends we see have less to do with which new therapies will emerge than about how care will be delivered and by whom -- and about who will be responsible for calculating value.

First, it's a virtual certainty that clinical practice guidelines will be adopted and refined to achieve the goal of standardizing patient care across practices and geographies. Second, we can easily see that the shortage of primary care physicians will require that nurse practitioners be given greater clinical responsibility and autonomy. Third, consumer empowerment will set the stage for consumer *responsibility*: patients will have to spend more of their discretionary income on health services, which will impose on them the obligation to decide what matters and how much it's worth.

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