

STRATEGI RS BERADAPTASI DENGAN NEW NORMAL PASCA COVID-19

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*“In times of great uncertainty, the most critical skill is
to be able to adapt as conditions change,
This is a kind of ambidexterity: focusing on surviving
in the current moment while you also build toward
thriving in a future that will look different”*

Sarah Stein Green berg
Executive Director of the Stanford d. school

DAMPAK PANDEMI COVID-19

KESEHATAN

- Krisis kesehatan
- Mengancam jiwa

SOSIAL

- Kemiskinan meningkat
- Penganguran meningkat

EKONOMI

- Pertumbuhan ekonomi triwulan 1 (2020) : 2,97%
- Investasi menurun
- Ekspor impor menurun

KEUANGAN

- Restrukturisasi hutang
- NPL meningkat

Dampak covid-19 sangat **luas** dan **dalam** karena mengganggu sisi ***demand*** (permintaan turun, konsumsi turun) dan ***Supply*** (terganggunya rantai pasok dunia)



Kehidupan berubah (*new normal*)



RS harus beradaptasi

WHO Tegaskan Vaksin Covid-19 Tak Akan Tersedia Sebelum Akhir 2021

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KOMPAS.com - Penelitian pengembangan vaksin **virus corona** yang dilakukan oleh sejumlah perusahaan kini telah memasuki uji klinis.

Akan tetapi, Organisasi Kesehatan Dunia (**WHO**) telah memperingatkan bahwa kecil kemungkinan untuk memiliki vaksin tersebut sebelum akhir 2021.

Pengembangan dan distribusi massal vaksin secara luas dipandang sebagai cara yang paling mungkin untuk mengendalikan Covid-19.

Pemerintah di seluruh dunia telah menggelontorkan dana untuk penelitian vaksin ketika perusahaan farmasi, universitas, dan lembaga penelitian saling berlomba dalam mengembangkan vaksin.

Tiga perusahaan farmasi terbesar AS, Inovio, Moderna, dan Pfizer kini telah memulai uji klinis, yaitu tahap pertama dalam pengembangan vaksin.

Sementara itu, para peneliti di Oxford University yang didukung oleh Pemerintah Inggris mengatakan mereka bertekad untuk memproduksi vaksin pada musim gugur nanti.

RS harus bertahan



Hidup berdampingan dengan covid-19 (*coexist*)

EASY LIFE

MORE DIFFICULT LIFE

Comfort Zone
(Denying, Lifestyle)

Fear/Panic Zone
(Complaint,
Sensitive, Wasteful)

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

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



Leaders need to think and act across 5 horizons

From Resolve to Resilience and Reimagination to Reform



Address the immediate challenges that COVID-19 represents to the institution's workforce, customers and business partners

Resilience



Address near-term cash management challenges, and broader resiliency issues during virus-related shutdowns and economic knock-on effects

Return



Create a detailed plan to return the business back to scale quickly, as the virus evolves and knock on effects become clearer

Reimagination



Re-imagine the “new normal” – what a discontinuous shift looks like, and implications for how the institution should reinvent

Reform



Be clear about how the regulatory and competitive environment in your industry may shift



Exhibit 2 | Three Time Horizons to Consider When Developing Scenarios

Flatten

(2–3 months)

React to the crisis and ensure the safety of your people

Manage possible cash constraints and avoid unnecessary costs

Ensure business continuity and focus on immediate short-term challenges or opportunities

Fight

(subsequent 12–18 months)¹

Quickly resume business activities and ramp up

Prepare for a fluctuating recovery of demand and supply

Balance building resilience with capturing opportunities and placing bets

Adapt to evolution of the outbreak and be ready for a nonlinear recovery

Future

(likely end of first half, 2021)

Adapt to new-normal behaviors

Focus on opportunities to grow top and bottom lines amid a global recession and subsequent recovery

Source: BCG analysis.

¹ Estimated period before a vaccine can be produced at scale, according to the World Health Organization.

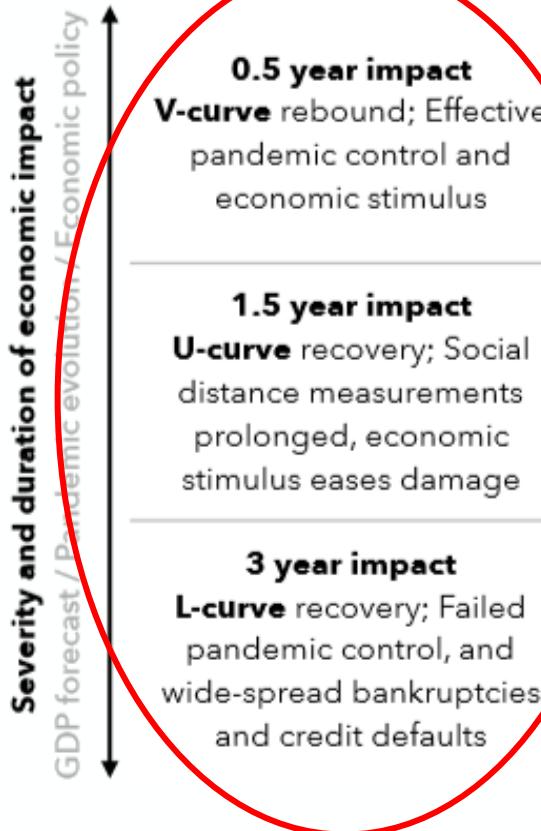
Define your strategy

Covid-19 Strategy Matrix

boardofinnovation.com

Note: strategic response also depends on cash position, competitive position and industry attractivity.

Impact on your organisation				
Direct impact of Covid-19 / Indirect impact of economic recession / Ability to adapt fast				
	Positive Revenue growth through demand surge e.g. E-commerce	Mildly negative Sustained revenue loss of 0-15% in Q2-4 2020 e.g. Consumer Goods	Severe Sustained revenue loss of 15-50% in Q2-4 2020 e.g. Oil and gas	Catastrophic Sustained revenue loss of +50% in Q2-4 2020 e.g. Tourism
0.5 year impact V-curve rebound; Effective pandemic control and economic stimulus	Ride the wave: boost supply to keep up with demand surge	Push through and prepare for fast back-to-normal upswing	Survive and prepare for relatively slow back-to-normal recovery	Mothball large part of the business and prepare for re-start
1.5 year impact U-curve recovery; Social distance measurements prolonged, economic stimulus eases damage	Push for growth and market share	Defend, improve competitive position, and find new growth	Pivot through organic innovation and inorganic growth, or divest	Pivot through organic innovation and inorganic growth, or divest
3 year impact L-curve recovery; Failed pandemic control, and wide-spread bankruptcies and credit defaults	Aggressive push for growth and market share	Defend, improve competitive position, and find new growth	Prepare for aggressive new entrants. Reinvent and create totally new position, or abandon	Abandon market



Fokus RS: Arus Kas (*cash flow*)

LABA- RUGI (*INCOME STATEMENT*)

- Data masa lalu (History)
- Total pendapatan – total biaya
- Pendapatan bisa merupa uang kas atau piutang
- Jika umur piutang panjang akan mengganggu cash flow

ARUS KAS (CASH FLOW)

- Prediksi (forecasting)
- Uang masuk – uang keluar
- Uang masuk
 - Operasional : pasien tunai, pembayaran BPJS
 - Investasi : jual aset
 - Pendanaan : pinjam uang ke bank
- Uang keluar
 - Operasional : bayar gaji, bayar obat, listrik dll
 - Investasi: menambah aset (tanah, membangun, alkes)
 - Pendanaan : bayar cicilan bank, dividen

Manajemen Kas (*Cash Management*)

- 1. Biaya SDM** : Menunda rekrutmen karyawan, kurangi lembur, manfaatkan insentif iuran BPJS TK (aturannya segera keluar)
- 2. Persedian** : Tidak boleh menumpuk
- 3. Piutang** : Secara aktif menagih
- 4. Hutang** : Restrukturisasi hutang, TOP diperpanjang
- 5. Pajak** : Manfaatkan insentif pajak (PPh 25, PPh 21 dan PPN)
- 6. Investasi** : Ditunda

NEW NORMAL POST COVID-19

1. Penurunan Daya Beli

Pemulihan ekonomi memerlukan waktu

- Pendapatan rs memerlukan waktu 12-18 bulan untuk kembali seperti sebelum covid (kurva : V - U - L)
- Biaya terus meningkat : SDM dan HPP (PPI : APD, hand rub, dll)
- Margin akan tertekan
- Solusi : **Operational Excellent** (mencari cara baru yang lebih efisien)

2. Design dan Bangunan

- Rawat jalan dengan konsep Cluster (asuhan keperawatan, periksa dokter, layanan farmasi dan laboratorium di satu area)
- Kebutuhan ruangan dengan 1 TT (single room) akan meningkat
- Menyediakan ruangan khusus one day care (ODC) dan tindakan elektif
- Menyediakan ruang isolasi yang cukup dan standar (tekanan negatif, hefafilter)

3. Digitalisasi Layanan : Telemedicine, AI, Robotic

Tahap Layanan Telekonsultasi

1. Pre konsultasi (sebelum konsultasi dilakukan)

- Proses pendaftaran
- Menyusun jadwal dokter
- General consent (do & don't)
- Pembayaran

3. Post Konsultasi

- Pembayaran obat (invoice)
- Pengantaran obat
- Penjelasan obat

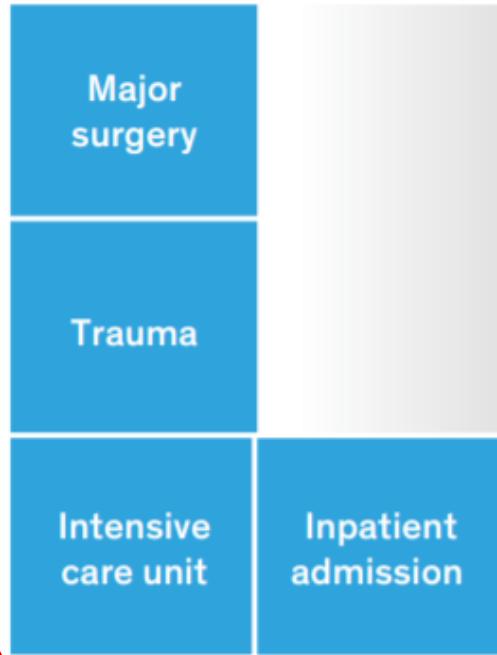
2. Selama Telekonsultasi

- Koneksi
- EMR
- Platform : zoom, whatapp video call, dll

As retail becomes stronger, what will move out of the hospital?

[US EXAMPLE]

Services that will remain in the hospital



Retail (services that will move out of the hospital)

Vaccinations	Specialist	Specialist consults
Physicals	Laboratory	Imaging
Vaccines	Minor procedures	Minor emergencies
• 82% of consumers have said they are willing to use retail clinics for vaccination		

Consultations

- 70% of consumers have said they prefer digital solutions to phone/in-person solutions for many healthcare interactions
- 55% have used digital appointment reminders

Lab/diagnostics

- 76% of consumers have said they are willing to seek lab tests at retail clinics
- 74% are willing to go to those clinics for preventative health screening

Minor procedures

- 80% of consumers have said they are willing to seek care for minor illnesses at retail clinics
- 40% of retail clinic visits are for minor illnesses or injuries

Fokus pengembangan RS

4. RAWAT INAP KELAS STANDAR (PERPRES NO 64/2020)

Pasal 54A

Untuk keberlangsungan pendanaan Jaminan Kesehatan, Menteri bersama kementerian/lembaga terkait, organisasi profesi, dan asosiasi fasilitas kesehatan melakukan peninjauan Manfaat Jaminan Kesehatan sesuai kebutuhan dasar kesehatan dan rawat inap kelas standar paling lambat bulan Desember 2020.

1. Peninjauan manfaat → urun biaya ?

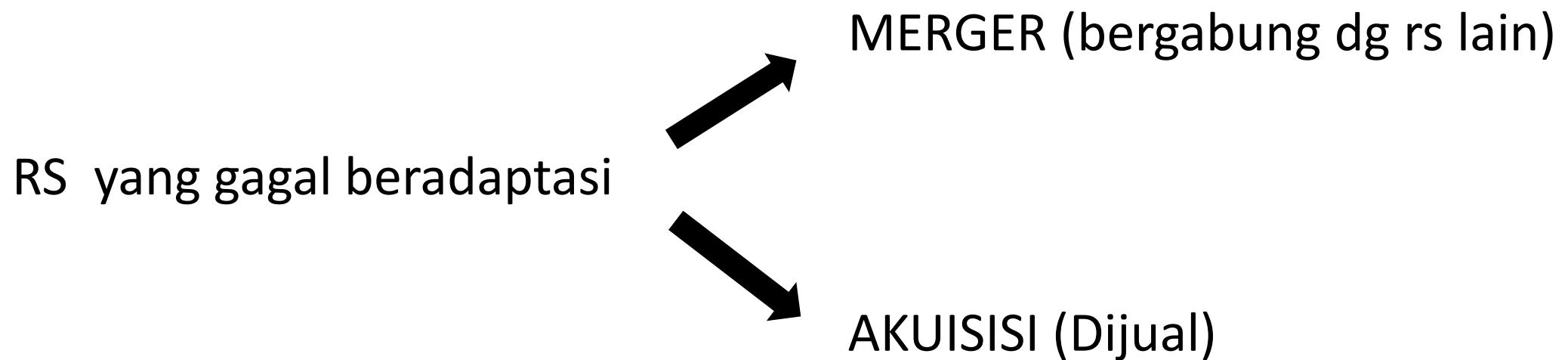
2. Kelas standar : 2 TT, 3 TT atau 4 TT ?

3. Tahap implementasi 2021 - 2022

Pasal 54B

Manfaat sebagaimana dimaksud dalam Pasal 54A diterapkan secara bertahap sampai dengan paling lambat tahun 2022 dan pelaksanaannya dilakukan secara berkesinambungan untuk meningkatkan tata kelola Jaminan Kesehatan.

5. MERGER DAN AKUISISI



Leadership in the New Reality Requires Head, Heart, and Hands



SEVEN
PRIORITIES
FOR THE
NEW NOW

- 1 Smart work**
Drive smart work to create a competitive advantage
- 2 Physical and mental health**
Ensure and sustain the physical and mental health of your employees
- 3 New paradigm for skills and talent**
Build, buy, and borrow talent and skills@scale
- 4 Flexible workforce**
Prepare for the new business environment, which requires more flexibility and more dynamic planning
- 5 Leadership with head, heart, and hands**
- 6 Purpose-driven culture**
Foster a resilient, purpose-driven culture prepared to meet the challenges of the new reality
- 7 Bionic organization**
Accelerate the revolution of your operating model and create a bionic company to maximize the potential of digitization



TERIMA KASIH