



HOW TO SUPERCHARGE TELEMEDICINE

*From episodic care to continuous,
AI-enabled health relationships*

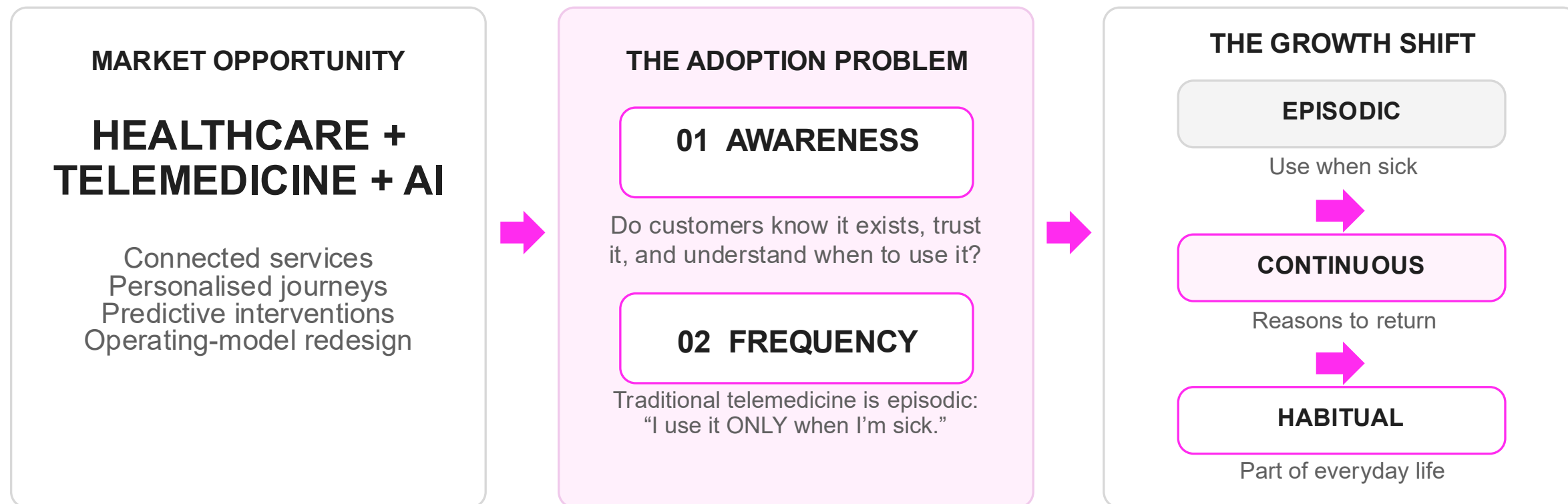
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humanLAB | Executive Strategy Case Study
September 2026

Telemedicine represents one of Asia's biggest untapped growth and transformation opportunities - across users, revenue and lifetime value.

Yet most platforms remain designed around episodic illness, rather than an ongoing health relationship.

2. SET-UP: HEALTHCARE, TELEMEDICINE & AI TRANSFORMATION

Healthcare and telemedicine have significant AI enabled growth potential.
Telemedicine platforms must overcome two structural adoption barriers before growth becomes repeatable.



STRATEGIC CASE QUESTION

How do you turn a low-frequency healthcare transaction into a high-value, ongoing customer relationship?

3. THE ADOPTION EQUATION: A MULTIPLICATIVE SYSTEM

If any critical factor approaches zero, adoption collapses — even when awareness is present.

$$\text{Adoption} = \text{Awareness} \times \text{Relevance} \times \text{Trust} \times \text{Value Perception} \times \text{Experience} \times \text{Habit} \times \text{Ecosystem Integration}$$

Awareness

Do people know it exists?

Relevance

Is it useful between illness events?

Trust

Does it feel clinically reliable?

Value

Is the price / benefit obvious?

Experience

Is the journey consistent?

Habit

Is there a reason to return?

Ecosystem

Is it embedded where users already live?

One weak multiplier can suppress the whole system — the priority is identifying and strengthening the weakest factors, not adding more features randomly.

Takeaway:

Continue growing acquisition while strengthening the weakest adoption multipliers in parallel, turning awareness into repeat use, MAU and long-term customer value.

4. GLOBAL BEST PRACTICE: LEADING PLATFORMS ARE EXTENDING BEYOND TELEMEDICINE INTO CONTINUOUS HEALTH MANAGEMENT

The strongest benchmarks show that future telehealth platforms win by combining embedded distribution, longitudinal data, care orchestration and lifecycle engagement.

Strategic thesis: Telemedicine should not simply benchmark “video consultation” leaders; it should learn from platforms that make health habitual, embedded and ecosystem-led.

IN-INDUSTRY / SUPER-APP



WeDoctor — China

Best benchmark for health super-app architecture, embedded distribution through WeChat, hospital/provider integration, longitudinal care and ecosystem scale.
Reported at 240M+ registered users, 7,800+ hospitals and 270,000+ doctors.

Strategic Lesson: reduce adoption friction by embedding care inside daily digital behaviour — not relying only on standalone app discovery.

REGIONAL / SEA



Halodoc — Indonesia

Best benchmark for payer/employer economics and integrated digital-to-physical care.
Halodoc says its corporate model handles 24% of cases using only 8% of spend, resolves 95%+ without physical follow-up, and reaches 1.5M+ users via 3,000+ corporate partners and 30+ insurers.

Strategic Lesson: prove ROI for payers and employers, not only convenience for patients.

OUTSIDE-INDUSTRY / LIFECYCLE



BabyTree — China

Best outside-industry benchmark for lifecycle ecosystem thinking. BabyTree understood that customers do not have a single baby-product problem; they have an entire parenting life to manage — education, records, products, community, experts, health and family decisions.

Strategic Lesson: consumers do not have a “telemedicine problem”; they have an entire health life and family-care journey to manage.

US VALIDATION — TELADOC

Teladoc provides U.S. scale validation: 100M+ U.S. members demonstrate that virtual care can achieve significant scale, while its shift toward integrated, chronic and data-driven care reinforces the same direction of travel.

5. WHAT TELE-MED PLATFORMS CAN LEARN FROM EACH MODEL

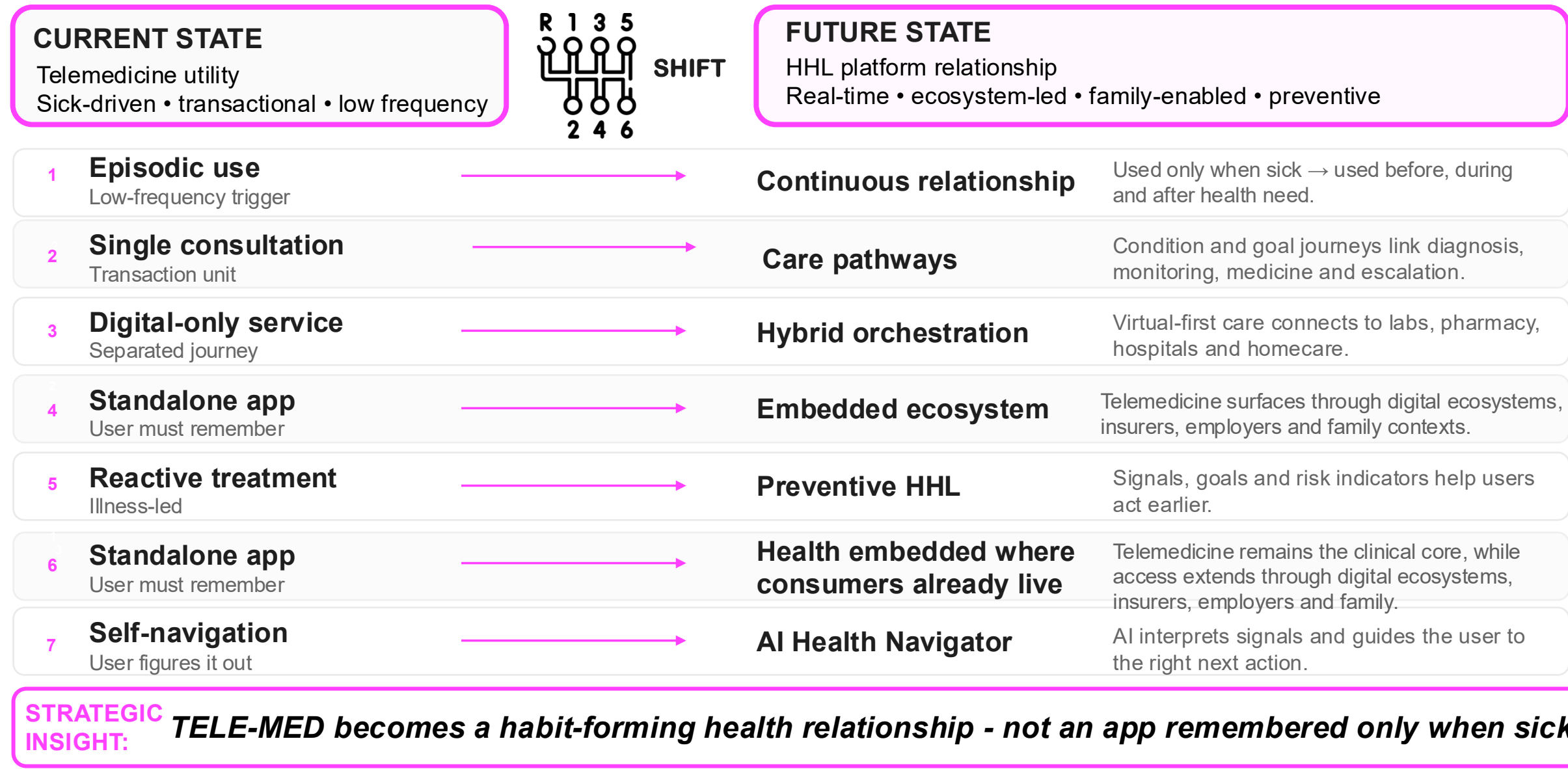
The right benchmark is not one company; it is the combination of distribution, ecosystem economics, lifecycle frequency and integrated care capability.

BENCHMARK DIMENSION	WeDoctor China health super-app	Halodoc Indonesia integrated care	BabyTree China lifecycle ecosystem	Teladoc US scale validation
STRATEGIC ROLE	Primary future-state architecture benchmark for embedded health ecosystem and super-app logic.	SEA benchmark for payer, employer and care economics.	Outside-industry model for lifecycle / family engagement.	Supporting proof of large-scale virtual care adoption.
DISTRIBUTION LESSON	Healthcare works best when embedded into daily digital life via WeChat.	Scale through insurers, corporates and service integration.	Win by owning a life-stage need, not a single transaction.	Enterprise / payer access can create massive virtual care reach.
VALUE CREATION	Hospitals + doctors + AI + records + prescriptions + government models.	Digital consults + pharmacy + corporate savings + high case resolution.	Content + community + records + products + experts + family decisions.	Integrated care, chronic programmes and whole-person care at scale.
TELE-MED IMPLICATION	Use existing digital ecosystems as the embedded distribution layer.	Build employer and insurer ROI with integrated digital to physical care pathways.	Move from “doctor app” to HHL/family health lifecycle platform.	Keep scale ambition, but avoid copying a purely US model.
STRATEGIC RELEVANCE	10/10 — strongest future-state architecture benchmark.	9/10 — closest regional economics benchmark.	9/10 — best frequency/lifecycle analogy.	7/10 — useful validation, secondary strategic relevance.

Takeaway: Combine WeDoctor’s embedded ecosystem, Halodoc’s payer economics and BabyTree’s lifecycle frequency — with Teladoc as scale validation, not the primary model.

6. FROM EPISODIC CARE TO CONTINUOUS HEALTH MANAGEMENT

Seven strategic shifts that move Tele-Med from a low-frequency telemedicine utility into an always-on HHL health relationship.

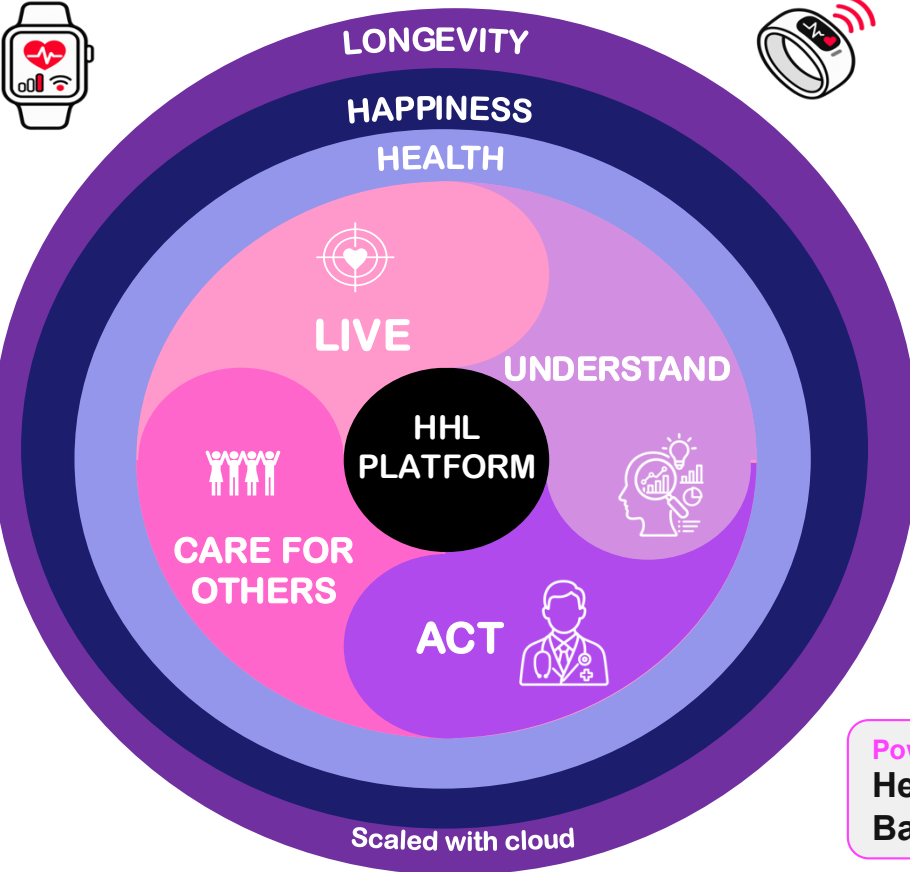


7. HHL: FROM EPISODIC CARE TO CONTINUOUS HEALTH MANAGEMENT



A continuously connected health platform that understands the individual and family in real time, then turns health data into action, frequency and measurable outcomes.

North Star



1.
LIVE

Continuously capture the signals that matter.
Connected devices generate real time data to power HHL
Phone • Ring / Watch • BP cuff • Sleep • Activity
Food photo • Body scan • Glucose • Medication • Diagnostics

2.
UNDERSTAND

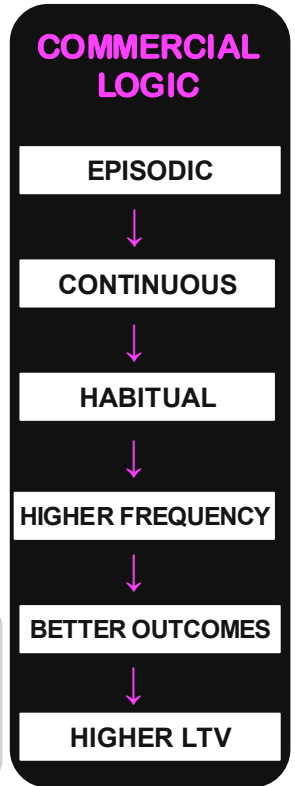
Turn fragmented data into meaning and next-best action
Health Vault • Longitudinal record • AI Health Navigator • Trend detection
Goal tracking • Digital twin • Baseline • Family history • Consent rules

3.
ACT

Connect insight directly into care, services & commerce
Doctor • Specialist • Pharmacy • Lab / Imaging • Hospital
Dietitian • PT / Gym • Physio • Mental health • Chronic care

4.
CARE FOR OTHERS

Extend permission-based support across the family
Children • Partner • Parents • Grandparents • BP today
Adherence • Sleep change • Fall alert • Next consult • Rx delivered



Powered by:
Health Vault • Connected Devices • AI Health Navigator • Digital Ecosystem • Permission-Based Family Consent

HEALTH

Manage physical health:
clinical care, fitness, nutrition, prevention

HAPPINESS

Feel and function better: mental health, sleep,
stress, energy

LONGEVITY

Stay healthier for longer: risk prediction,
biomarkers, healthy ageing

7. HHL: FROM EPISODIC CARE TO CONTINUOUS HEALTH MANAGEMENT



A continuously connected health platform that understands the individual and family in real time, then turns health data into action, frequency and measurable outcomes.

WHAT MAKES HHL DIFFERENT?

1. Real-time data

Health signals move from static records to live understanding.

2. Family Monitoring

One person can coordinate care for parents, children & grandparents.

3. Clinical Escalation

Wellness data connects to doctors, pharmacy, labs & chronic care.

4. Platform Ecosystem

Identity, connectivity, loyalty and distribution create scale.

8. KPI EVOLUTION: FROM TELEMEDICINE PERFORMANCE TO HHL RELATIONSHIP PERFORMANCE

Future-state scorecard expands from operational transactions to frequency, data depth, prevention, family engagement and measurable health outcomes.

KPI: TODAY — TELEMEDICINE PERFORMANCE

Measures how efficiently Tele- Med delivers consultations and service transactions.

1 CUSTOMER

MAU, consultations, repeat use, NPS, time-to-doctor and journey completion. Tracks demand, satisfaction and access.

2 CLINICAL

Digital resolution, escalation, readmission, chronic outcomes, adherence and adverse events. Tracks safety and quality.

3 COMMERCIAL

Revenue, revenue/user, gross margin, CAC, LTV:CAC, employer contracts and revenue per covered life.

4 DIGITAL

DAU/MAU, conversion, booking abandonment, app stability, journey duration and self-service completion.

5 ECOSYSTEM

Active doctors, utilisation, specialty coverage, hospital / pharmacy / insurer partners and lives covered.

KPI: TOMORROW — HHL RELATIONSHIP PERFORMANCE

Measures how deeply the platform understands, engages and improves lives over time.

1 FREQUENCY & HABIT

Weekly active use, sessions/user, retention, non-sick engagement and active health goals. Solves episodic usage.

2 CONNECTED HEALTH & DATA DEPTH

Health Vault activation, wearable/device connections, record completeness and permissioned longitudinal data.

3 HHL OUTCOMES

BP, sleep, body fat, metabolic risk, fitness, screening, mental wellbeing and healthy-life indicators.

4 AI PREVENTION

Navigator engagement, proactive intervention rate, escalation accuracy and time from abnormal signal to action.

5 FAMILY

Linked family members, elderly monitoring, medication adherence, fall alerts, family-plan retention and network penetration.

6 HEALTHCARE ECONOMICS

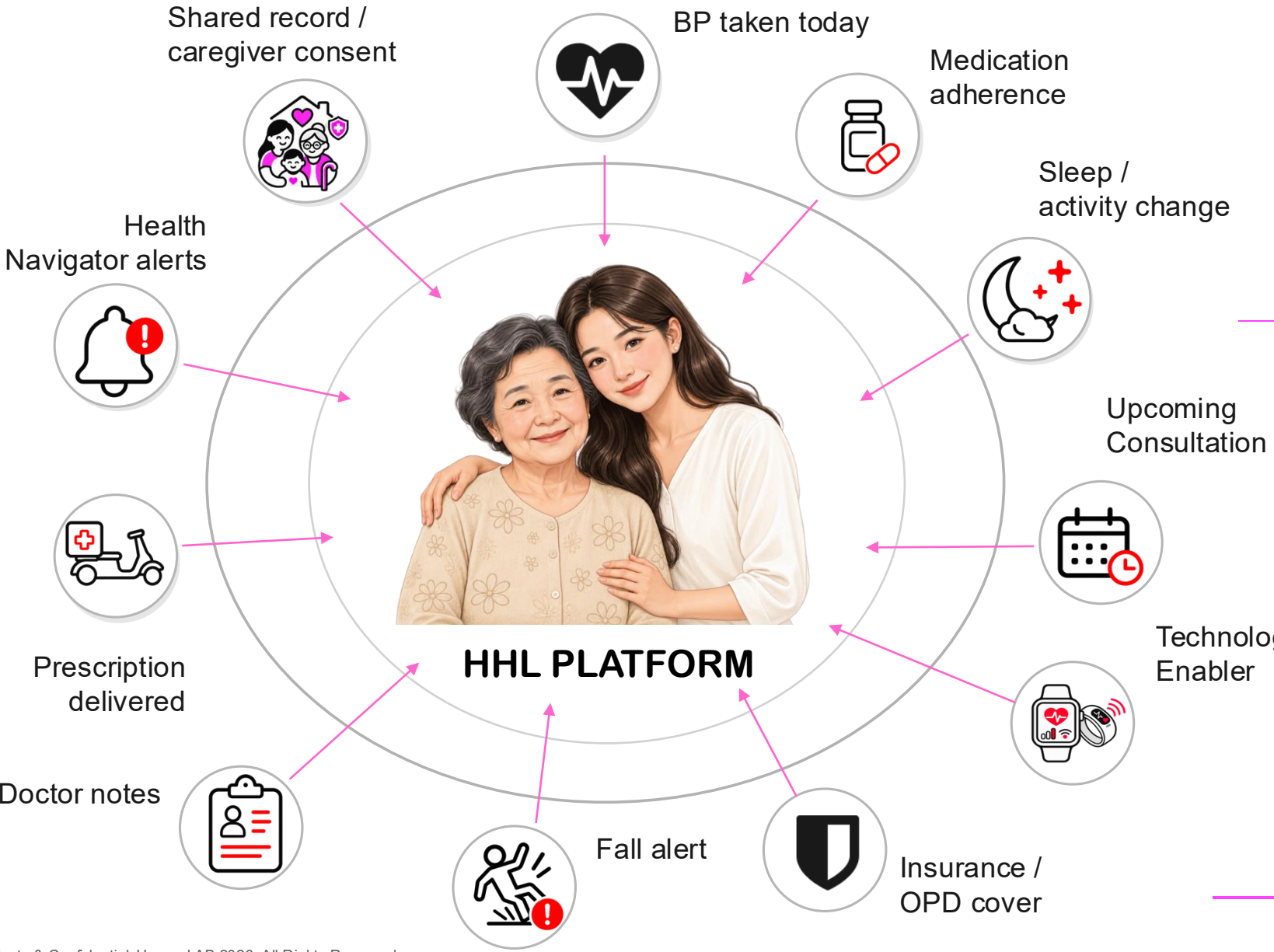
Avoided OPD visits, lower cost per covered life, chronic-care savings, absenteeism reduction and programme ROI.

SUMMARY CURRENT PROPOSITION

Current KPIs manage the telemedicine transaction. Future KPIs manage the active health relationship — frequency, data depth, AI prevention, family care, outcomes and economics.

From counting consultations to helping people and families live healthier, happier and longer lives.

19. FAMILY HEALTH CARE INFRASTRUCTURE



HHL Equation:
 Health + Happiness +
 Longevity = Peace of mind!



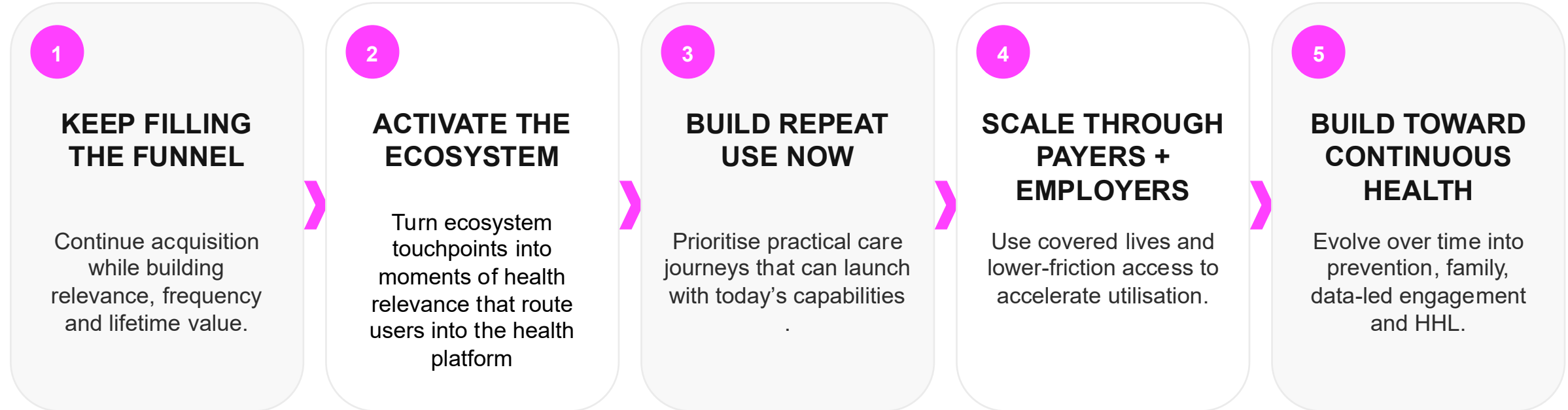
Connected care across generations. Peace of mind for the entire family.



9. STRATEGIC SYNTHESIS: FROM TELEMEDICINE UTILITY TO CONNECTED HEALTH RELATIONSHIP



5 priorities emerge from the outside-in review.



**The opportunity is not simply to scale a telemedicine app.
It is to architect and build an ongoing health relationship that can be
distributed at scale.**

