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## Foreword

Our Healthcare world is the one sector, that perhaps above all others, truly is grounded in its core purpose of “helping save patients’ lives”. Whether we are keeping our hospitals clean and infection free or providing lifesaving nutrition through the food we serve, each role, in its own way connects to this ‘higher purpose.’

The recent COVID-19 Pandemic has graphically illustrated this real connection to the realities of ‘life and death’ in hospitals around the world. Furthermore, now we can’t overlook the key ground realities related to tech and its associated areas for the Healthcare market in India before we get into the various solution building blocks. Be the challenging environment our hospitals are operating in, patients being our consumers getting evolved everyday or patient experience and satisfaction is a critical driver for growth and differentiation.

We understand how important the well-being, health and safety of patients, residents, visitors and staff members are. Based on this fact, the document here helps to summarise and deliver sound, evidence-based information regarding best practices in healthcare foodservice and give you a sense of our capabilities in the sector, globally and in India. In addition, you will also explore several elements around quality of food, service, convenience, and safety that are high on a patient’s priorities.

The unavailability of a usable Nutrition database in India, the inadequacy of existing govt. database, which apparently is also not integration ready or the lack of an adequate Dietician system in hospitals, may seem to be the major challenges of the system, but they also open doors for opportunities we can work together on.

The wider inference of this, is that a continued investment in skill and infrastructure for all leading hospitals to stay ahead of the disease curve is needed.

There is an incredible number of choices, instantly available at our fingertips, enabled through aggregators and apps, in everything we consume. Today, smartphones being the preferred, and in many cases the only, way consumers access products and services it’s essential for us to be the part of the inclusion and provide them that convenience through technology.

Moreover, we live in the experience economy where the value of any brand is completely dependent on the experience that it can create for the consumer across all touchpoints. While these trends may be disruptive, the key thing is to realize that they are also creating opportunities.

Through this resource, we present some ideas and opportunities for you, on transforming the hospitals, to meet the needs, requirements and expectations of your patients, residents, visitors and staff members while keeping their convenience and a great experience in mind.

## The Challenges for Healthcare in India

The healthcare system in the country bore the brunt of the pandemic that revealed dents and dots in the system across India since the March of 2020, and even when almost the entire nation was on shutdown, it continued to be on its toes. The country's healthcare sector has grown rapidly over the last 5 years with a Compound Annual Growth Rate (CAGR) of approximately 22% since 2016, according to data from India Brand Equity Foundation. Healthcare has become one of the largest sectors of the Indian economy, in terms of both revenue and employment.

The Indian Government has undertaken several major reform efforts to strengthen the healthcare sector over the last few years. The flagship initiative of the Government, Ayushman Bharat, for instance, seeks to comprehensively strengthen the health system right from the primary level to tertiary care, thereby signaling a marked shift in focus from the implementation of vertical health programs. But this journey of growth is not without its fair share of challenges.

While the list is not exhaustive, a few major challenges that the healthcare industry in the nation faces include: the first is oversupply (especially in the top metros) where nearly 70% of all major private hospitals are located. This has an impact on a key metric for hospitals like bed occupancy.

The second is that 'new' diseases are emerging at a much faster rate than ever before. COVID-19 is a major example of this, and studies have shown that roughly 3 lakh pathogens have the potential to spread from animals to humans. The broader implication of this is that there is a continued need for investment in skill and infrastructure for all leading hospitals to stay ahead of the disease curve.

The third challenge is around government policies and regulations for example around price caps that impact ability to charge and therefore generate margins as well as funds to invest in research and infrastructure. And finally, especially in top cities, patients and their families today are both able to afford and are more focused on their health and wellness than in the past.

In a post pandemic world, returning to the new normal for masses only mean the need for better preparation and strategizing for healthcare facilities and it is crucial to upgrade the entire patient experience. As the world braces the idea of returning to work and restarting the common way of life, hospitals and healthcare facilities across India need to revamp themselves and prepare themselves for the challenges of the future.

## The Compass Approach

Our society is changing not only from an age but also from a greater variety of dietary choices as people today are clearer on what they want and expect that need to be met conveniently. For inpatients or attendants, mealtime can and should be a bright spot for uplifting their spirit, amidst the inevitable anxiety associated with a hospital stay.

We at Compass believe in the fact that food as medicine aims to enable a shift from reactive cure to proactive healing.

In this context, our solution focuses on 3 key aspects to drive differentiation and relevance –

1. **Nutrition and Wellbeing Outcomes –**

We understand that every meal is an opportunity for us to offer you healthy nutritious food, that is not only delicious to eat but also supports your nutritional requirements and recovery. So, this pillar focuses on nutritional needs of the patients, by providing diets based on macro and micro nutrition data and are patient and procedure specific through a specially designed Nutritional guidance platform.

2. **Delivering ‘Happy Food’ Experiences –**

Food plays a very important role in the recovery process of a patient, not just nutritionally but also keeping in mind the feel-good factor psychologically. This pillar focuses on creating a sensorial experience by offering enhanced choices and providing ease of ordering, payments and feedback management.

3. **Excellence in Service and Operations through Technology –**

There is an incredible number of choices, instantly available at our fingertips, enabled through aggregators and apps, in everything we consume. Being a food service provider, it's essential for us to be the part of the inclusion and provide them that convenience through technology. This pillar focuses on prioritizing safety protocols and providing sustainable sourcing and best-in-class service delivery.

## Making Healthy Food Smart: The Compass Way for Ideal Nutrition

Nutritional care is a basic human right for all people. Nevertheless, undernourishment is known to be a frequent and serious health care problem among hospitalized patients. Nutritional documentation contributes to ensuring proper nutritional treatment and care. At the heart of our food program lies a substantial, proprietary body of research and aggregated data that Compass India has put together around Medical Nutrition Therapy (MNT). We have created what we believe is the first and most comprehensive nutritional database in India for a food service company - covering detailed, ingredient level, macro and micronutrient data for everything that goes into all our dishes and menus including information around allergens.

At our own Innovation and NPD kitchens and in partnership with nutritional research companies (for example, Equinox Labs), we have tested many ingredients to ensure that the data we are capturing is accurate. The nutrition data is primarily based on most reliable Indian Food Composition Tables (IFCT, 2017)

**Compass is the largest institutional food services company in the world with a leading presence in the Healthcare sector across 45 countries and we have access to global expertise in nutrition which we have synthesised along with a lot of secondary global and India specific research in this area.**

We have also extended this research to include what is the ideal micro and macro nutrition required for specific procedures that are most common in large hospitals so we can develop procedure specific diets. And using technology we can push these diet designs into the centralized menu planning and production management system which can then ensure that the kitchen unit is able to create these dishes and meals to the specification required.

Put together, this foundational capability allows us to design patient and procedure specific menus by using the right ingredients in the right quantities across dishes, meals, and dayparts.

There are 3 components to how we help enable better health and wellness outcomes:

- a. **In-depth understanding of the patient's nutritional needs:** The first component of our food program design is clearly understanding the patients nutritional status at the time of admission and what influences a patient's nutritional needs in a hospital setting. Age, gender which are part of demographics is an important one, underlying health conditions whether it's hypertension, diabetes etc. is another, what procedure is the patient in the hospital for is important and finally dietary preferences and cultural beliefs like Jain, vegetarian etc. need to be kept in mind.
- b. **Patients and procedure specific menus:** Using our research and proprietary database, we design specific menus depending on the ideal macro and micro nutritional needs of the patients including procedure specific diets for example for cardiac, diabetic and renal patients which together comprises ~60% of all hospital cases in India. The same research and dataset enable us to design procedure specific menus for example for pre-surgery and post-surgery, day care procedures etc.
- c. **Nutritional guidance platform:** For the hospital dieticians, all the data, logic and rules are accessible through a nutritional guidance platform which helps them provide

more customized and effective meal recommendations or suggest tweaks etc. without any manual work thereby improving their efficiency and effectiveness. Today, dietitians spend a large portion of their time today doing manual calculations around nutritional data for different meals, many of these are patient specific requests from doctors. This impacts their productivity, introduces chance of manual errors and because of lack of data and our database resolves all such challenges and problems thrown at it. To make it easy for the dietitian to use the platform on the go especially while doing their rounds, we have developed a responsive web app that offers a simple, intuitive experience and enables effective guidance by showcasing nutrition information at a micro level. The app can be accessed by the dietitian via smartphone or tablet.

## Curating Experiences: Catering Beyond Expectations

Designing experiences that translate into 'patient satisfaction' translates to development of a comprehensive understanding of what a patient and his/her family undergoes during their time at a healthcare facility. Research shows clearly that patients are in a vulnerable state of mind as they enter the hospital and during their stay, from anxiety around what will happen, depression at the turn of events, feelings of being trapped and frustrated, loneliness especially in case they don't or can't have an attendant in the room. Our food program acknowledges the reality of these emotions and is designed with this context in mind.

Since there is a myriad of experiences that patients are going through, **every meal and food service touchpoint becomes an opportunity to create a comforting and caring experience.** And for us, there are three aspects of this experience design:

- a. **Focus on the senses:** Our goal is to create a positive sensorial experience with food cooked with care. We feel food is not just something we eat; it is an incredibly rich tapestry of influence in our lives. And therefore, when we look at the food we serve, we strive to create something that appeals to all the senses of the patient and reminds them of all these positive emotions. Our cooking process ensures most of the valuable nutrients, flavour and textures are retained. We don't cook anything with used oil, we don't use palm oil and added trans-fat, we restrict artificial ingredients and flavour enhancers and limit sugar. This ensures that not only is the food extremely appealing to the senses but also good for the patient's health.
- b. **Variety and choice:** Our food program offers enhanced food choices for IPD & in-room dining patients with menus that are focused on three broad categories - nurture & care, comfort food that are deeply nostalgic and familiar and responsible indulgence. We feel this increased variety and choice will make patients feel more in control of their wellbeing.
- c. **Smooth and intuitive food delivery app:** Available for all patients, attendants, doctors, staff, and visitors this app allows easy discovery, ordering and payment with a smooth, intuitive experience. Also, here the menu choices available to a patient can be configured based on her dietary requirements and dietitian inputs. Embedded within the app is a feedback management feature that captures patient feedback after every meal service and makes that transaction level data available real time for fixing any issue that may be raised. This digital platform also enables deployment of an integrated solution for visitor cafeterias. Orders can be placed via smartphones,

tablets, kiosks web portal and are pushed via integrations with the kitchen management platform.

Finally, Compass has a suite of intelligent F&B vending solutions. Our food vending solutions can handle a wide assortment including fresh food items like wraps and sandwiches. The F&B vending solutions can be located at different areas of the hospital and can improve convenience and availability of food especially during odd hours. So that is what we will deploy to ensure **happy food** experiences not only for patients but also staff, doctors, and visitors.

## Curating the Optimum 'Patient Experience': Tech Transformations

There is a very visible evolution that is happening all around us and the huge rise in awareness around health and wellness has led to growth of health tech, wearables and fitness apps for tracking, dieting & counselling and many other areas. And our patients who are consumers themselves, are part of this evolution and are increasingly trying to take a greater role and more conscious control over their health and wellbeing.

Social media is ubiquitous and both a means of engaging as well as a channel for immediate feedback on products and services through tweets, Instagram posts etc. There is an incredible amount of choice in everything we consume, this choice is immediately available at our fingertips enabled through aggregators and apps. Smartphones today are the preferred and, in many cases, the only way consumers access products and services. Our society is changing not only from an age but also from a greater variety of dietary choices as people today are clearer on what they want and expect that need to be met.

Hence, for the healthcare sector in India, a combination of sector level challenges and evolution of consumer context and expectations means that patient experience and satisfaction today have an incredibly important role to play in terms of hospital reputation and growth.

If that is so, it's important to understand some of the factors are that can influence patient satisfaction. There are:

- a. The right type of medical and nursing care that the patient expects
- b. Smooth and quick back-office processes are important at the time of discharge and admission
- c. Room and general ambience– temperature, sound etc.
- d. Housekeeping, and hygiene standards
- e. Quality of the food being served – taste, temperature, ingredients. Most patients are on a normal diet and don't have many restrictions on what they can eat and for them this is important.
- f. Service convenience – how easy is it to request for things at the hospitals and get services delivered – whether for the patient or their attendant
- g. Quality of the above-mentioned services (timeliness, consistency and effectiveness)
- h. Safety – how safe is the food and service being offered in the hospital

In this context, we have created a solution for the healthcare sector that can help drive differentiation and relevance based on three critical outcomes –

- a. Improved nutrition and wellbeing through better understanding of patient specific macro and micro level nutritional needs and designing food programs at dish, meal and daypart level based on these specific needs
- b. Improving patient experience (along with attendants, staff, doctors, and visitors) through exciting and enhanced food choices and easy to use digital apps for ordering, payment and feedback
- c. Excellence in safety and service operations which is all about responsible and capable sourcing and technology enabled service delivery in a manner fully transparent to you as the client

## Harnessing Technology: Smart, Safe and Healthy Food

Compass is known globally for our focus on safety for employees and clients. Our safety promise focuses on ensuring we follow, sustain, and track implementation of all Compass global HSEQ and FSSAI standards.

- a. SHIELD App: Our key objectives of this solution, named SHIELD, is to enable a Zero-Defect posture, Manage any Critical Situations promptly and will full attention. It enables communication and escalations to relevant stakeholders and tracks the status of the same till closure. This app provides a very intuitive interface to record any incident or near miss in a matter of few seconds. It captures relevant data points along with visual proof while logging the incident or near miss. All these data points help in performing the right RCA. Once the incident or near miss is captured, depending on the type, this app also guides the operations team to perform relevant tasks to make sure that the issue is addressed immediately.  
Through SHIELD we can generate Vendor wise HSE performance and track our Vendors' HSE audits which help us in doing the right governance with vendors and provides relevant data points to take appropriate actions. This 360-degree view of data points of all incidents and near misses, does not only close and track it but also take right actions and interventions to keep improving on the security posture.
- b. Responsible procurement: An important aspect of our procurement capability is responsible sourcing and supply chain spread and reliability. To enable a nationwide procurement capability, we have Compass Distribution Centres spread across 5 locations in India. Our commitment towards sustainable and responsible sourcing is delivered through clean sourcing and traceability programs where we work with only approved vendors and collaborate with vendor partners to waste and carbon emissions.
- c. Offsite commissary kitchens: For hospitals that do not have the kitchen facilities infrastructure to manage all culinary operations on-site, Compass is the only food service provider in India to have a large network of 6 off-site central processing units or commissary kitchens across 5 cities. These units have capacities ranging from 10 to 35000 meals per day and they are designed to ensure high degree of consistency at high volumes that can cater effectively to the needs of hospitals of all sizes.
- d. Platform to track measurable outcomes: At Compass, we commit to delivering a very specific set of outcomes that are relevant and critical for your hospital. These are - 99.9% delivery of right meal to the right patient, 99.5% adherence to meal service times, 80% and above patient feedback score, and closure of all Level 3 issues within 48 hours.

And to ensure that there is complete transparency around our service delivery, we will enable an operations excellence portal with a login access for you. Here you can track several aspects of our operations including self-performed operational audits, meal delivery timeliness SLAs, patient feedback scores and issue tracking and closure logs. This is something that is unique and will give you an unprecedented level of visibility into the quality of our work.

So that is what we will deploy to ensure excellence in service delivery standards and service protocols. To summarize what we covered, our program will deliver 4 specific benefits to your hospital - highest standards of hygiene and food safety, responsible and effective sourcing capability, transparent tracking and visibility of our performance and commitment to deliver service outcomes important for your hospital.

Bringing the best of all worlds together and engaging technology to knit a one of its kind experiences for the patient, Compass's solutions enable wellbeing, experience and quality across all our service, nutritional and operational touchpoints. These are curated as:

1. FoodBook platform that enables discovery, ordering, payment and feedback capture
2. Diet plan simulator which is the dietician platform
3. Shield and the operational excellence portal that enables service excellence and safety.

We are not medical professionals, but we know food really well and we are inspired by the possibilities that the best designed food programs present to improve well-being, aid recovery and bring a smile to a patient's face. So, through food, we aspire to work in partnership with your doctors, nurses, dieticians and staff to enrich and heal those we care for. This is our purpose as healthcare food service professionals, and it is a journey we want to walk on with you.

## Conclusion

Food is an outlet of relief, a symbol of some stability and safety in the tumultuous times an individual spends in an hospital. Hospital and healthcare facilities need to shun the image of 'hospital food' being the reminder of sad times but instead transform it into an experience that remind the patients and their families of a safe haven in the challenging times.

With the added opportunities that technology has brought in, especially in context of the transformation of a patient into essentially a customer who must be guaranteed a curated experience for optimum satisfaction, healthcare facilities across the nation now need to look ahead to rehaul what food means to them and their patients in the days to come. With this grand shift induced by technology access and pandemic underway, hospitals should be:

- Understanding patient needs better and ensure the food is curated according to their preference and needs while maintaining taste and quality
- Bringing in a greater variety of safe food options
- Focusing on greater convenience in ordering through contactless interfaces and cashless transactions via in app ordering
- Reducing the workload of dieticians by using our vast research, with nutrient composition of huge variety of food items
- Keeping track of quality and feedback received on the same, to make food an experience to relish

The current disruption has led many industries to re-imagine their business models and strategies. Healthcare food services sector is also at the cusp of a rapid transformation and through various innovations, keeping pace with the requirements of corporates and ready to welcome India's dynamic workforce in the '*next normal*'.

So, it is only right to consider the immense possibilities bought in by Team Compass and take it ahead in the days to come to make best of the world class research and dedicated team effort that has gone into making this a reality for you.