

## Content of the strategic analysis of DOCTOLIB

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## I- Overview of Doctolib

### a. About Doctolib

Doctolib is a start-up founded in 2013 by Stanislas Niox-Chateau (Doctolib 2019). It falls into the e-health category defined by the World Health Organisation as the use of information and communication technologies to facilitate health improvement and health care services (WHO 2019). E-health is often used alongside traditional “off-line” (non-digital) approaches for the delivery of information directed to the patient and the health care consumer. In fact, Doctolib provides two products for two distinct customer segments: healthcare providers and patients. To healthcare providers, it offers an agenda management software and to patients, an online booking platform. The platform makes money with the 129€ monthly subscription (Doctolib 2019) that doctors pay to have access to the agenda management tool. Booking an appointment via the platform is free and Doctolib does not take any commission for any appointment taken on the platform.

For now, Doctolib has the majority of its activities in France (80%) (Aurelia Louis 2019) but since June 2016, it has started to expand in Germany (Doctolib 2019). Originally, Doctolib only offered an agenda management tool for independent doctors but in December 2016, it signed its first contract with the APHP (LesEchos 2019), a Healthcare institution, starting its collaboration with hospitals. Moreover, in July 2018, Doctolib bought its main competitor Mondocteur (Techcrunch 2018) therefore becoming the market leader. Finally, since January 2019, Doctolib offers online consultation (BFMtv 2019). All of these actions have participated to Doctolib’s disruption of the healthcare industry and are part of its strategy.

### b. Why is Doctolib interesting?

The recent entry of Doctolib in the circle of the Unicorns<sup>1</sup> with a last funding round of 150million€ in March 2019 (Maddyness 2019) arouses interest in the start-up's strategy, especially considering that there are only 4 unicorns in France and that in 2018, only 3 French companies raised more than €100million (LesEchos 2019). Thus, one might be interested in how Doctolib has managed to achieve such a milestone, without benefiting from the first mover advantage. Mondocteur entered the market six months earlier (Crunchbase 2019) and Keldoc one year earlier (Keldoc 2019) but Doctolib quickly overtook them.

Moreover, Doctolib is interesting to study as these rounds of funding will enable more actions and strategic moves to the company. However, as Doctolib grows, it will be challenged to keep on providing a personalised and personal product to healthcare providers.

### c. [Broader relevance](#)

Looking at how successful Doctolib's strategy has proven to be<sup>2</sup>, it could thus be interesting for other e-health companies or governments to analyse it. They might share the same challenge of getting healthcare providers to agree to a product leading to great improvements in the healthcare industry.

The Healthcare industry is not the only one to be disrupted by the online booking system. Therefore, companies from other service industries might learn from Doctolib's solution to change a system like online booking that has long been anchored in the society. For instance, online beauty appointments or restaurant reservation booking platforms could use Doctolib's strategy to gain more users on both the client and provider side.

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<sup>1</sup> A unicorn is a term used in the venture capital industry to describe a privately held start-up company with a value of over \$1 billion (Investopedia 2019)

<sup>2</sup> Awarded EY strategy of the year 2016

## **II- Doctolib's environment**

### **a. Increase in appointment booking and care paths lengths**

There is a global increase in appointment booking due to increasing population, longevity and proportion of chronic conditions. For instance, according to a Deloitte report on digital health, over a quarter of UK population have a long-term condition (LTC), a number that is increasing each year, and these people use 50% of all GP appointments and 70% days spent in hospital beds (Deloitte 2016). The increasing number of LTC resulted in a rise of healthcare appointments taken and of the variety of doctors seen. Therefore, there is a need for optimization in the healthcare process (e.g: better addressing patient from doctor to doctor) in order to reduce patients' care path time.

Moreover, as doctors are overwhelmed with more and more patients willing to get appointments merely at the same time (10am and 2pm according to a study let by Zocdoc, an online appointment booking platform) (LifeHacker 2013), resulting to waits of up to 80 days to see an ophthalmologist (l'Express 2018).

### **b. Economic environment**

In France, where it is already implemented, Doctolib has a favourable economic environment. In terms of competitors, at first glance, one might think that Doctolib operates in a very competitive sector counting the number of different actors, but Doctolib has managed to become the biggest one by buying out his main competitor Mondocteur in 2018. Now Doctolib manages 25% of online booking appointments in France, more than all of his other competitors (Statista 2017).

Moreover, Doctolib operates in countries with a large and dynamic Healthcare industry. Germany is the 3rd country of the OECD with the most healthcare spending and France the 5th

(LeFigaro 2017). To put this ranking into perspective, healthcare in France represents 11% of GDP with an overall spending per habitant of 4600\$, 15% superior to the OECD average (LeFigaro 2017). Doctolib therefore has tangible growth opportunities in France and Germany especially regarding partnerships with governments like Babylon partnered with the NHS in the UK.

### c. [Social environment](#)

The very positive economic environment in which Doctolib evolves must be contrasted by its social environment. In fact, Doctolib's business model might not fit some country's social common manner of going to the doctor. In some countries there are no appointments, which makes Doctolib's business model less relevant (Aurelia Louis 2019).

However, the social environment of Doctolib is still showing opportunities of new customer reach. In fact, three quarters of e-health mobile apps (also called m-health) users are 34years old or less (IncisiveHealth 2018). Meanwhile, people aged of 45 or more count for 53% of the overall medical appointments taken in Europe. Moreover, only 18% of the German population has ever used an m-health app (IncisiveHealth 2018).

On the other hand, regarding doctors' adoption of a new tool, the usefulness of this tool in their daily work life is a pain point. In fact, it has been shown that Doctors take advantage of technological opportunities of e-health when they project positively into a use that could facilitate their professional practice or their patients care path (J Habib 2019)

Doctolib's strategy must then focus on usage and in order to be efficient.

#### d. [Technological environment](#)

Mobile phone usage and smart phone apps literacy is one of the most important aspects of Doctolib's environment. This aspect seems not to be a barrier to Doctolib's development as smartphone usage and internet literacy are very developed in Europe where 70% (Eurostat 2018) of people use a portable computer or a handheld device to access the internet away from home or work and 89% of people have internet access at home (Eurostat 2018). Moreover, using online platforms for medical appointment booking is not a barrier for Doctolib in big cities where most of the appointments are taken. For instance, 62% of people living in the Parisian area use such platforms (LaCroix 2019).

There is also an overall rise of services online usage for private services (from 65% in 2015 to 75% in 2019), but human secretaries remain the main way of booking medical appointments with only 6% of doctor offices that use only online services for appointment booking (LaCroix 2019).

Finally, Doctors seem to use more and more technologies to communicate with each other. 9 doctors out of 10 use their phone to communicate information to other doctors to get advice on patients' conditions (J Habib 2019).

#### e. [Legal environment](#)

Some of the main legal issues that must be taken into account when analysing Doctolib's environment are data protection and health regulations. Regarding data protection, the European General Data Protection Regulation system (GDPR) prohibits any processing and requires personal data holders to take appropriate technical measures to fit in the security requirements (GDPR 2018).

Regarding Healthcare regulations, Doctolib's offer for online consultation is constrained by the agreement of governments. For instance, before implementing it in France, Doctolib had to wait for a law to pass in order to make it reimbursable by the social security (SpaceTechnologies 2018).

#### f. Opportunities

The often-public nature of healthcare makes the political environment welcoming to Doctolib as the start-up offers a healthcare path optimization tool which could reduce costs and increase care quality (Grosjean et Bonneville 2007, Topol, 2014). For instance, Doctolib was founded with the help of the French government in 2013 (J Habib 2019), showing that the country found a utility in Doctolib's services. Therefore, considering the size of the economic environment, very liked to the political environment, partnering with governments would be an opportunity for Doctolib, who would be the only relay for appointment booking and agenda management for public healthcare providers.

Moreover, regarding the increase in appointment booking and the rise of smartphone and Internet usage by patient and doctors there is a clear opportunity for digital solutions in improving patient care paths by managing these appointments.

Finally, the social environment clearly shows an opportunity for the adoption of such tool by doctors and patients as long as it is seen as a useful tool by patients too.

With a rather stable environment, because Doctolib operates in developed countries where the internet is already used massively and healthcare systems as well as government are stable, Doctolib has the set up to be a specialist company. Doctolib will thus be able use its internal resources, which is why they must be looked at.

### **III- Doctolib's internal resources**

#### **a. Users from two sides of the healthcare industry**

One of Doctolib's major internal resource is its users. The most interesting part about these users is that they are both on the buy side and sell side of healthcare by touching patients and doctors. Doctolib has managed to reach 150 000 doctors and 2000 hospitals/multi-Doctor offices that pay for the product (Doctolib 2019). Moreover, 42million appointments are taken every month on the platform (Doctolib 2019). These numbers include both Germany and France.

Healthcare providers are the most important resource among the users because they are the one that provide revenues to Doctolib. Indeed, healthcare providers pay a monthly fee to Doctolib in order to use their platform, but patients have access to the online booking features for free. Furthermore, Doctolib does not sell their users' data (Doctolib 2019), meaning that they do not even have any indirect income from the patients that use the booking platform.

#### **b. Employees and offices**

However, Doctolib would not have achieved such a performance in user acquisition without the workforce in their offices. This is why offices and employees are other key internal resources for Doctolib. In fact, Doctolib has offices in all major cities of France and Germany adding up to a total of 50 offices (Aurelia Louis 2019) and counts 1000 employees in its team. On the other hand, because Doctolib had such a growth in users, the start-up had to employ people -in order to keep on providing the same quality of product - at a rate of 14employees per month.

However, offices are not a lesser strategic resource as they are spread across France and Germany, allowing Doctolib to have a visibility on potential new user resources across the countries.



#### IV- Goals

The superordinate goal of Doctolib has not changed since its beginning in France. According to the CEO (NOAH18 2018), the company aims to improve healthcare access and the life of people working in healthcare with better management solutions. A double observation is at the origin of this goal: in France, 1.5 billion medical appointments are booked each year and their management is a costly activity for doctor offices (BFMtv 2015). This is mostly due to unattended appointments which 71% of French doctors say they face once or twice per day, and because of the time spent by employees just to manage appointments (BFMtv 2015).

In order to achieve this main goal, Doctolib has broken it down into two subordinate goals. The first one is to make healthcare providers' booking management more cost-efficient. This is because Doctolib's team noticed that other appointment management alternatives could cost more than €700 while offering less functionalities (J Habib 2019). The second subordinate goal is to make healthcare less time consuming for both patients and Doctors. In fact, secretariats are overbooked by unstoping calls, making patients sometimes wait for 30minutes before having someone on the phone (J Habib 2019). Moreover, patients have to wait for months before seeing a specialist. For instance, a French resident had to wait for 80 days on average in 2017 to get an appointment at an ophthalmologist (LesEchos 2017).

#### V- Strategy of Doctolib

Doctolib's Main strategy is to focus on increasing the number of healthcare provider signed up as they are the intermediaries to achieve their goal. This involves two sub-strategies: creating a tool that will appeal healthcare providers and convincing them to use it.

a. Create a tool that will interest healthcare providers

In order to make healthcare providers interested in Doctolib's product, therefore unlocking new potential doctor subscribers, Doctolib has analysed the critical aspects in making their product seen as a valuable tool by doctors.

The start-up is focused on improving the work experience of doctors by reducing their admin time, improving the medical experience of patients, making Doctolib a good investment and making their software accessible.

i. Give healthcare providers a more comfortable work experience by reducing admin work

Doctolib makes its tool interesting for healthcare providers by reducing the time of their admin work by 65% (Doctolib 2019). To do so, Doctolib has focused on three ways to improve time management: reducing time spent on the phone, save time in medical consultation management and improve communication with collaborators.

First, Doctolib can reduce time spent on the phone by eliminating phone calls dedicated to appointment booking (counting for 35% of incoming calls)(J von Ballenberghe Pedrosa 2015). Patients can simply book through the application or website. Moreover, as Doctolib makes much of the necessary healthcare information available on its platforms and sends out informative messages before consultations to patients, the number of calls is further reduced, and patients have less things to do. Moreover, Doctolib allows automatic prescription renewals, cutting the need for 16% of appointments/calls.

Secondly, Doctolib halves the time dedicated to appointment management. Because the service is digitalised, Doctors can easily allocate different time slots to different appointment types (e.g., emergencies, regular), monitor their waiting room and send automatic messages to warn patients if it is too crowded and there is delay.

Finally, communication between collaborators is easier as the online database avoids the need for doctors to interact with external entities to access patient information. In fact, a doctor A on Doctolib can set aside some appointments only visible by other doctors on Doctolib, so that doctor B can book an appointment at doctor A for one of his patients. When addressing a patient, doctors can add comments and join documents to that all of the information necessary to treat the patient is there (Medium 2018).

This more comfortable work experience allows doctors to focus on their main job rather than administrative tasks while also enhancing the medical experience of patients, the second part of Doctolib's first sub-strategy. In fact, when digitalizing an important user-facing service, doctors ensure that their patients will fully adopt and approve of the new platform. Therefore, user friendliness and accessibility to patients, as well as the new medical experience it offers them is a determining factor in doctors' decision when implementing Doctolib.

## ii. Provide a better service to patients

When coming to see a doctor, patients need to have their full attention in order to be fully satisfied by their experience<sup>3</sup>. Therefore, reducing the number of incoming calls sometimes occurring during appointments could increase patient satisfaction. Moreover, patients can book appointments online, instantly at any time.

“We have access to availabilities straight away, the page details all the necessary information: cost, payment method, place. I would use it with every doctor if I could » (medium 2019)

This sense of easy access to a doctor is also emphasised by the waiting list system. When there is a wait longer than two weeks to get an appointment, patients can sign up to a waiting list and are notified as soon as an appointment is cancelled.

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<sup>3</sup> 45% of patients think that a doctor should not stop an appointment to answer the phone (CNM 2017)

If the patient is glad to get an appointment quicker, doctors are better off because they do not have gaps during the day due to last minute cancellations.

### iii. Make Doctolib a good investment for doctors by increasing their annual revenue

“Time is money”, this is why no shows and last-minute cancellations are at the heart of doctors’ offices process inefficiencies. Doctolib reduced no shows by 60% (Doctolib 2019) simply by sending reminding texts and putting a cancellation option on their website. In fact, the main reason for no-shows are the wait between appointment booking day and the day of the appointment. In that time interval (for more than a week), patients forget about the appointment (Medium 2019).

However, some doctors argue that Doctolib makes it easier for patients to cancel last minute, which would lead to more no-shows (J Habib 2019). But thanks to the waiting list, any cancelled appointment can be replaced, thus saving doctors up to 2000 euros a month, equivalent to 20 times the monthly cost of the platform (ObjectifEco 2016).

Moreover, Doctolib offers a marketing tool to help doctors increase their visibility. In fact, when patients look for a doctor’s name, the option to book an appointment and their Doctolib profile appears directly. Moreover, Doctolib is on Google’s first positions for specialty + city searches. Therefore, doctor’s that are on Doctolib appear first and are directly bookable.

Overall, these measures brought on average 18% of additional revenue for doctors (Doctolib 2019).

### iv. Give healthcare providers an accessible tool

Doctolib also understood that healthcare providers will for sure not be interested by a difficult tool to implement or a complicated tool, which would also ruin the time saving solutions we talked about previously.

Doctolib makes sure that their tool is useable anywhere at any time and in a simple way for doctors by building a smartphone interface as well as a computer one.

Doctolib also provides a versatile tool adaptable to the changing needs of 8 different medical specialties and hospitals (Doctolib 2019). Moreover, the start-up provides access to assistance to install and set the different features of this tailoring opportunity. Doctolib also includes training courses in their product for both doctors and other members of the medical office, allowing them to all take full advantage of their tool.

Finally, Doctolib has taken actions to make Doctolib as accessible as possible by aiming at a maximum of two hours to put their software in place for the first time, making it a simple tool to implement.

With such an easy and simple tool to implement, Doctolib optimizes both the work of doctors but also the way its tool works.

#### b. [Convince healthcare providers to pay and use the tool](#)

As the first part of Doctolib's strategy is to optimise doctor's administrative processes, the second concerns advertising the platform. This sub-strategy is essential as convincing doctors to adopt Doctolib helps Doctolib reach their goal to improve healthcare access and the life of people working in healthcare with better management solutions. In fact, as the product itself leads to more cost and time efficiency theoretically, no changes can be achieved without the implementation of the tool.

To achieve this, Doctolib uses a direct advertising strategy by calling and visiting every medical offices town by town in France and Germany. This is done thanks to a commercial team worth 30% of Doctolib's total workforce, the largest team of the company. Moreover, in order to be as efficient as possible, Doctolib has 40 different offices across France and 10 across Germany (Aurelia Louis 2019) in order to be as close as their potential new clients as possible.

## **VI- Evaluation.**

Though Doctolib's strategy relies on new doctor acquisition, the unicorn faces uncertainty about whether these actions will be efficient enough to transform healthcare. Doctolib depends on regulations and on Doctors perception of how useful of a tool Doctolib is. Therefore, Doctolib adapted to this situation by setting two subordinate goals that will arouse the interest of healthcare providers: cost and time efficiency of healthcare.

In order to judge Doctolib's strategy, I will evaluate if Doctolib acts differently from competition, in ways that represent the right trade-offs (Vaughn Tan, 2019) and that fit the context of constraints and available resources using Porter's framework on activity fit (Porter, 1996).

First, Doctolib provides a variety of product and services that other booking platforms do not provide. In fact, compared to its main competitor in France Keldoc, Doctolib provides assistance on implementing the product as well as better communication between doctors and marketing tools (Doctolib 2019, Keldoc 2019). Moreover, even if Doctolib is not the only one to serve the need of online booking and agenda management tool for patients and healthcare providers, it is the only one to propose a marketing tool for doctors. Finally, Doctolib offers and promotes its platform to doctors in a way that no one else does by operating like a local business in order to be as close to doctors as possible to answer their needs and convince those

who are not using Doctolib yet. Therefore, Doctolib's strategy is very unique but mostly thanks to the range of services it offers to Healthcare providers and its advertising techniques as the competitive environment it operates in leads to similarities in serving the needs of doctors and patients.

Because Doctolib offers such a variety of products leading to better quality of services to healthcare providers and patients, one trade-off had to be made on price (to pay for the expenses of having more employees). In fact, Doctolib costs 129€/month (Doctolib 2019) and keldoc only 40€/month. This trade-off is a good strategic trade-off as it does not affect healthcare providers. In fact, the quality of services leads to a rise in revenue for doctors which compensates the monthly fee.

Doctolib's initiatives to help doctors improve their cost and time efficiency are coherent with the start-up's goal of optimizing healthcare processes and the life of healthcare providers, but also improves patients' care paths and care experience, thus helping healthcare providers to reach their own goal of improving the health of their patient the best way possible. Therefore, Doctolib's actions are in second order fit of Porter's framework (Porter 1996).

On the other hand, Doctolib, by making sure the maximum of healthcare providers adopts their product -by providing an accessible and useful tool, as well as doing direct advertising with positions across France and Germany-, allows healthcare providers to offer a better service to patients. In that way, Doctolib reaches its own goal of improving healthcare with the help of its customers. Sharing a common goal with their customers makes Doctolib's strategy a third order fit which forms a competitive advantage.

To conclude, having a unique competitive position, trade-offs and choices thoughtfully chosen vis-a-vis competitors, and a competitive advantage arising from a third order fit across activities gives Doctolib a sustainable competitive advantage.

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Aurelia Louis, interviewed by author on the phone, on the 22<sup>nd</sup> of November 2019, recording available on request.