

# Reimagining Healthcare in Viet Nam

WHITE PAPER

2022



“ How might we provide better preventative care to Vietnam’s workforce? ”



# WORKSHOP PARTICIPANTS



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# Executive Summary

On 23 September 2022, over 50 healthcare professionals representing 30 organizations gathered in Ho Chi Minh City to reimagine preventative care for Vietnam's workforce.

This marked the 2nd annual Reimagining Healthcare workshop and brought together a diverse representation of the healthcare

industry, including hospitals and clinics, insurers and brokers, pharmaceutical brands and distributors, as well as online consumer health players and non-governmental organizations.



The challenge posed for reimagination was, **how might we provide better preventative care to Vietnam's workforce**. How might we help healthy team members stay healthy and help those that require medical care recover more quickly? And from an employer's perspective, how might we have a productive and engaged workforce?

One remarkable phenomenon witnessed in the wake of the COVID-19 pandemic was the role that

employers have in supporting their employees to access care. In Vietnam, what started with employer campaigns to get their companies vaccinated, evolved into management teams—CEOs, Dept Heads, and HR Directors—becoming medical first responders. They were often the first to be called when an employee fell ill and supported those needing medical treatment. Industries that adopted sleep-and-eat on-site policies maintained even more extreme protocols of care.



While there has been a return to normalcy from the battle against the pandemic, what will remain is the rising demand for consumer healthcare. People are more conscientious of their health. They want to live healthier lives. They want to avoid hospitalization and are starting to demand more than what the current system can provide. What is also evident is that **one of the best (if not the first) channels for people to get access to healthcare is via their employer's benefits programs**—private insurance, corporate health checks, provider relationships, etc.

At this year's Reimagining Healthcare workshop, participants were led by Doodle Design through a series of design-thinking mindsets and methods to reimagine how to improve preventative care specifically for three patient personas: **Mr. No-Need-for-Health Check, Mr. Anxious Young Husband, and Mrs. Worrisome Retailer.**

To make the challenge more real, several employer partners joined in with the healthcare professionals, providing context and color to each persona, and giving the Reimagineers an opportunity to design actionable ideas and solutions. **This year the group used Mural, an online collaboration tool, and generated 333 ideas of which 12 were highlighted for their desirability, feasibility, and viability**—an intersecting sweet spot for innovation.



The most notable implication of the solutions generated is the changing dynamics in care delivery and the importance of digital solutions for preventative measures. Many of the highlighted ideas signal a shift in Vietnam's healthcare system post-COVID-19, emphasizing on:

**1. Consumerist trends shifting care outside hospital walls:** Care pathways are evolving, and whilst most of the care thus far is with public institutions, care delivery is now growing in alternate channels including clinics, pharmacy-driven self-medication, and online-to-offline models enabled by telemedicine.

**2. Digital health goes mainstream:** In line with global trends, digital health has gone mainstream, but cross-industry collaboration is noteworthy in Vietnam.

**3. Digital health is unlocking latent demand for women's health and mental health:** The rise of digital health has helped those with less access to care find new sources. Among these are women's and mental health, resulting in new solutions being launched.

**4. Preventative care on the rise:** As Vietnam’s workforce modernizes, better health is now seen as a major productivity gain by employers, and they are willing to partner with payers and health platforms to drive preventative-based care.

**5. Democratization of health in Vietnam:** High-quality advanced primary and secondary care is no longer restricted to Tier 1 cities and is now pervasive in Tier 2 cities like Da Nang, Hai Phong, and Can Tho.

The adage, **“an ounce of prevention is worth a pound of cure”**, certainly rings true in the conversation of preventative care. While Vietnam is a relatively young and healthy society, staying that way will require new ideas, investment, and coordination across the ecosystem to continuously improve access to quality care.

Reimagining Healthcare 2022 was co-organized by Doodle Design, Papaya Insurtech, Roland Berger, and Viet Capital Asset Management. The intention of the workshop is to showcase how a multistakeholder discussion using a patient-centric approach can be leveraged to drive healthcare innovation.





Mr. No-Need  
for Health-  
check



Mr. Anxious  
Young Husband



Mrs. Worrisome  
Remote  
Retailer

# INTRODUCING THE THREE PERSONAS

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## Mr. No-Need for-Health-check

### PROFILE

**Gender:** Male  
**Age:** 32  
**Place:** Ho Chi Minh City  
**Occupation:** Construction Engineer  
**Status:** Married  
**Personality:** Hard-working and sociable

### GENERAL DESCRIPTION

Mr. No-Need-for-Health-Check leads a busy life working at construction sites and sometimes in the offices. He often complains about the dirty air quality at construction sites making him cough. His work is intense and stressful, together with night shifts and irregular eating schedules, contributing to his chronic digestive problem. Besides work, he plays football 1-2 times per week. He also enjoys drinking beer with his friends and colleagues.

*Although I have a weak digestive system, I think I'm still young and my body can quickly recover. Like what happened with Covid-19: I had very mild symptoms and was fine after a couple of days. But I'll go visit the doctors if I can find time or maybe when my digestive problem gets worse.*

### CURRENT SITUATION

1. My morning starts with a coffee, then I rush to take my kids to school and go to work.
2. Construction industry is known for drinking culture, so it's common that I go drinking 3-4 times per week.
3. I smoke around 1-2 packs of cigarettes per week to keep me focused at work.

### GOAL

1. I want to maintain my health so that I can continue making money to support my family.
2. I wish I could have more time to exercise.
3. I hope I will not become a financial burden for my family, so my kids can have a better future.

### PAIN-POINTS

1. I do not have a good digestive system, as I have stomach cramps and feel bloated almost everyday. Whenever I have stomach pain, I just take the medicines given to me by pharmacists.
2. My wife keeps telling me that I need to have regular health check-ups, but I do not think I have serious health conditions to visit hospitals.
3. I find it difficult to find time to take a day off for health check-up.



## Mr. Anxious Young Husband

### PROFILE

**Gender:** Male  
**Age:** 28  
**Place:** Ho Chi Minh City  
**Occupation:** Sr. Software Developer  
**Status:** Married (1-2 years)  
**Personality:** Sociable, Hard-working, Anxious

### GENERAL DESCRIPTION

Mr. Anxious Young Husband is a Sr. Software provider who works for a large technology company, writing code in front of a computer for approximately 8-hours a day. He has been a keen runner and is part of the company's running group. Prior to getting married 2-years ago, he used to run five days a week but that has come down to only two. He came to HCMC from a nearby province to study and his parents are still living there. They are old and do not have the best medical care, and hence come to HCMC for their regular health check ups. He and his wife are expecting their first child in 6 months, and he feels the stress of moving into a bigger house, as well as the additional expenses that come with the additional member in the family.



*I'm going to be a father soon and am stressed how I will be able to provide financially for my wife and child, as well as help my mom get better medical care.*



### CURRENT SITUATION

1. I'm healthy and am physically active, playing sports regularly.
2. I recently got married and have plans to have children. My wife and I are currently financial stable but unsure about the future.
3. I am insured through my company but do not have a personal insurance policy (Life/Health).
4. My parents are aging, and my mom was recently diagnosed with diabetes and hypertension.

### GOAL

1. I want to be a good husband, father and son.
2. I want to be able to provide for my family and ensure there is financial stability and security.
3. I want a peace of mind from my parents' health standpoint.

### PAIN-POINTS

1. I'm very anxious about my baby that will be born in 6-months. I must make sure I can financially take care of my family.
2. I have not been able to sleep very well and am starting to feel more stressed at work. I often blow-up at my team.
3. My mom doesn't make it any easier, as I need to take care of her to and ensure she has better care.



## Mrs. Worrisome Remote Retailer

### PROFILE

**Gender:** Female

**Age:** 34

**Place:** Remote Northwest region - Lao Cai

**Occupation:** Retail worker

**Status:** Married with two daughters

**Personality:** Easy-going, Dedicated, Family-oriented

### GENERAL DESCRIPTION

Mrs. Worrisome Retail Worker leads a simple life, living in a rural remote area of Lao Cai, Northwest region of Vietnam. She works as a checkout staff in a local supermarket, doing night shifts three days per week. Besides work, she spends most of her time with her family, taking care of her young daughters. She has been suffering from serious back pain due to having to stand for long hours. She recently lost her mother to cancer, who was diagnosed at stage IV.

*My health is showing early signs of deteriorating, and I'm worried that I don't have the time or money to get checked. The nearest medical center is far away from me to seek help, especially in case of an emergency.*

### CURRENT SITUATION

1. I'm generally healthy but my back pain is getting worse.
2. I am insured through my company and eligible for an annual health checkup.
3. My mother died from cancer recently. She was diagnosed too late to seek treatment.

### GOAL

1. I need to be healthy in order to support my family.
2. I want access to good healthcare facilities and information so that I can seek appropriate and timely treatments whenever I need to.
3. I don't want to get cancer.

### PAIN-POINTS

1. I am worried about my back pain problem and that it may affect my ability to perform at work.
2. The nearest medical center is 50km away from me and it is a challenge to get there in case of an emergency.
3. I am anxious about not having enough information about common disease and treatments.

# WORKSHOP PROCESS

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The Reimagining Healthcare workshop addresses the challenges of accessing quality care in Vietnam by applying Design Thinking mindsets and methods. Given the complexity of the industry, the aim is also to have the most diverse approach possible, with participants representing a broad spectrum of the healthcare ecosystem.



For this year's Design Thinking challenge, the 50 participating healthcare professionals were grouped into six teams, each addressing one of the assigned personas—Mr. No-Need-for-Health-Check, Mr. Anxious Young Husband, and Mrs. Worrisome Remote Retailer. The groups were designed to balance perspectives with each team having one representative from each key industry stakeholder: a provider, an insurer or broker, a pharmaceutical manufacturer or pharma distributor, a digital health player, and an NGO or non-profit organization.



Facilitated by Chris Elkin, Founder of Doodle Brands, and his team, the workshop participants were lead through a series of methods and frameworks, including Persona Profile, Rose-Thorn-Bud, Affinity Clustering, Starter Statements, Creative Matrix/Alternative Worlds, Visualizing-the-Vote, and Impact/Difficulty Matrix. Given the size of the audience, we elected to use the online platform, Mural, which enabled the organizers to facilitate a large audience within a tight timeframe (less than 8-hours).



The general ethos of Reimagining Healthcare is organized around promoting “patient-first” mindsets. Design Thinking has been a great way to do that because it hinges on “human-centered design”. It causes each participant to think empathetically about the individual they are designing solutions for, to experience their challenges, and to wear their shoes.

With the aid of this empathy and enthusiasm—not to mention the online collaboration aided by Mural—the participants generated 333 ideas. These ideas were further refined into a shortlist based on their Desirability, Feasibility, and Viability. Based on votes from the participants, we synthesized these ideas into a Bullseye Diagram of Impact.

The following pages outline the Design Thinking frameworks that were applied during the workshop and highlight some of the outcomes that were generated by the group.





# DESIGN THINKING METHOD



## persona Profile

An informed summary of the mindset, needs, and goals typically held by key stakeholders

## Rose, Thorn, Bud

A technique for identifying things as positive, negative, or having potential

## Affinity clustering

A graphic technique for sorting items according to similarity

## Statement stagers

An approach to phrasing problem statements that invites broad exploration

## creative Matrix

A format for sparking new ideas at the intersection of distinct categories

## Alternative worlds

A way of using different perspective to help generate fresh ideas

## visualize - the - vote

A quick poll of collaborators to reveal preferences and opinions

## Importance Difficulty Matrix

A quad chart to facilitate participants in plotting items by relative importance/difficulty

# IDENTIFYING ROSE, THORN, BUD FOR EACH PERSONA



Human-centered design starts with an informed summary of the mindset, needs, and goals of a specific patient in need.

A technique for identifying experiences as positive, negative or having potential.



Participants were tasked with ‘visualizing’ and empathizing’ with their delegated patient persona: Mr. No-Need-for-Health-Check, Mr. Young Anxious Husband, and Mrs. Worrysome Remote Retailer. Participants discovered what was most top-of-mind and significant from their patient’s perspectives and the experiences they have in accessing healthcare.

# Rose-Thorn-Bud

She's aware that there's something not right	She's in downward spiral that keeps escalating	Trusted sources that are easy for her to follow as a routine	Annual check-up with insurance	Provide more information with her health check	Back pain
Social Health Insurance	Insured with annual checkup	Employer-sponsored insurance for high-risk cancer maybe?	She may self-diagnose and buy unnecessary medicine	Has annual check ups	Using SHI for healthcare services
Got some health issues but not yet get diagnosed	Far from city and good health care	Wants a source for trustworthy health info	Back pain could become a serious issue	Willingness for cancer prevention	Limited access: Far from medical center
Lack of knowledge leading to anxiety	Better regular access to HCPs rather than having to travel 50km	She's covered by insurance	Covered by minimum health care insurance	Have no time and money Far away from nearest health care less information	A quick check-in for good enough information for "next step" that does not require much effort and finance
Access to treatment	Can't get care near her when she is sick	Disease and treatment information	She would welcome remote medications and health supports	Has Insurance	Via annual check can access the right HCP to deal with back pain
Better health care options locally	Cancer screening for higher risk people annually for earlier detection	Worried about future, especially getting cancer	Help from company & other care services for physical checkup	Screening early to ease my worry about cancer	Lots of fear and Lack of Advice



# REFRAMING THE PROBLEM

## “HOW MIGHT WE...”



Statement Starters - An approach to phrasing a problem statement that invites broad exploration.

After pinpointing the priority problems to solve for their patient persona, the participants then reframed the problem statements as a creative question to invite more creativity in how we might solve the problems together. Phrasing the problem as a question—using “How might we”—invites broad, creative exploration. The intention is to challenge your assumptions and invite divergent thinking. The best statement starters find a sweet spot that is both provocative and accessible.

### Statement Starters: "How might we..."

Promote and incentivise adoption of healthier habits (in lifestyle and fitness)?	Motivate our Mr. No-Need-for-Health-Check to take care of his health proactively?	Provide a health check-up service with the most wonderful experiences, so you want to revisit?	Make people, especially young people, feel the urgency of taking care of their health rather than waiting until it's too late?	Reduce financial stress by designing financial planning and tools to take action to grow their wealth?
Provide physical therapy care convenient to patients who are busy and don't have time to travel to care centers?	Support people in rural areas with the best quality and convenient healthcare services?	Involve family and friends to proactively manage our health?	Consider designing and offering medical & insurance packages to low-income families?	Maintain health status, reduce pressure, and develop healthy lifestyle habits?
Reduce stress for younger generations by providing health solutions for their multigenerational family in one place?	Make the best insurance with personalized coverage at the lowest cost?	Improve access to information on insurance and financial planning?	Provide access to care at each construction site?	Coordinate care for chronic diseases so people can ensure better health outcomes for their parents?
Offer better education on preventive methods for similar groups in remote areas?	Improve access to affordable and quality healthcare services for people in remote areas?	Provide support to young first-time parents to go through the challenges of the new life?	Convince him that the checkup is not scary and will give him a full picture of his health?	How might we bring together and train many of "Mrs. Worrysomes" and help each other in a common way?
Transform the face of the healthcare industry to be more modern and appropriate for younger people?	Make healthcare access easy and convenient for health checkups to be done promptly?	Increase the # of health checkups for employees?	Provide a "one-stop shop" for accurate, easy-to-understand, and INTERESTING health info and advice?	Better equip young people with attitudes, knowledge, and skills to manage their families' health?



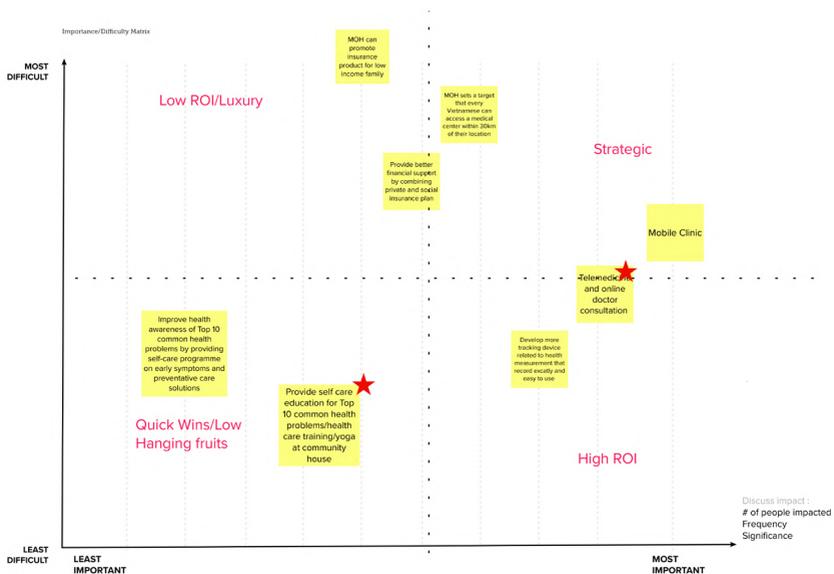
# IMPACT/DIFFICULTY MATRIX



Impact/Difficulty Matrix - Ideas are weighed against each other using two key criteria (1) the relative importance and impact in terms of the number of patients addressed, frequency of use, and extent of its role in solving the problem, and (2) the difficulty and cost of putting the idea into practice.

After sharing each idea in a rapid-fire session, the teams selected 10 ideas that they believed were most important and relevant to address their persona's challenges. These ideas were then ranked based on the Impact/Difficulty Matrix.

“HOW MIGHT WE IMPROVE PREVENTATIVE CARE FOR VIETNAM’S WORKFORCE?”



# IMPACT/DIFFICULTY MATRIX

## Luxury Nice to Have

- Luxury refers to initiatives which have relatively less impact on patient health outcomes and may require more resources and time to implement
- Such initiatives still need to be considered for the benefits of a specific patient population

## Strategic challenging but impactful

- Strategic refers to initiatives with considerable positive impact on patients but that require more resources and efforts to implement
- Such initiatives should be the focus for healthcare stakeholders in the long-term to create more sustainable impact for patients across multiple therapeutic areas

## Quick Wins Feasible but less impactful

- Quick Wins refer to initiatives which can be implemented in a timely manner to achieve relatively focused impact compared to other initiatives
- Such initiatives can be considered as the “low hanging fruit” to bring immediate benefits to patients

## High ROI Feasible and impactful

- High ROI refers to the degree of positive impact on patients relative to the ease of implementation
- Such initiatives should be a key priority for the healthcare community in efforts to increase access to quality care

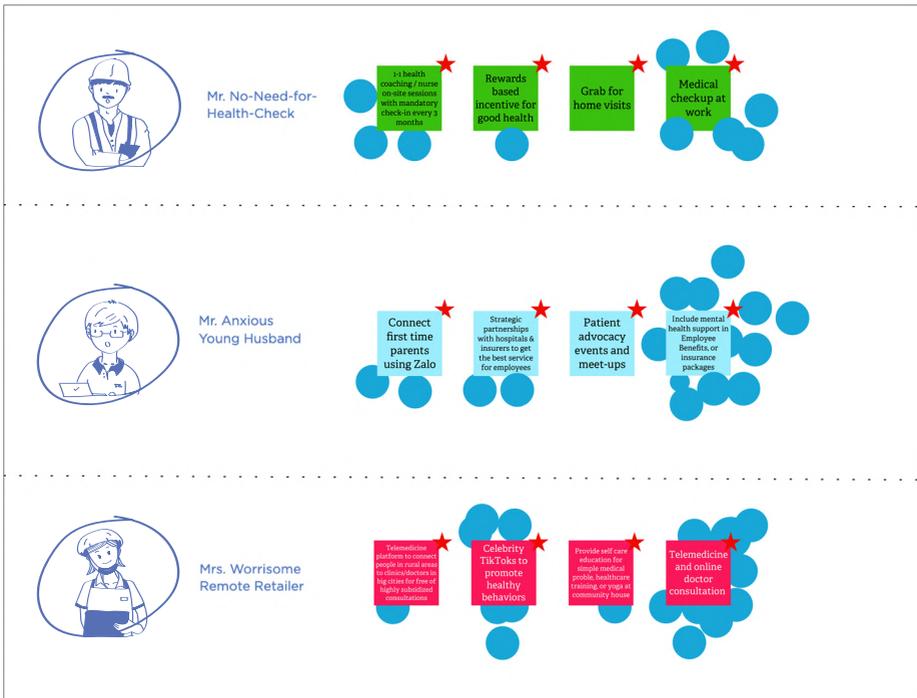
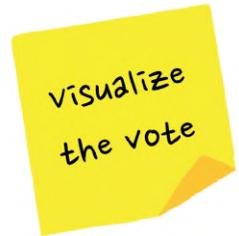
# SHORTLISTED IDEAS & VISUALIZING THE VOTE



D.V.F. Model - Innovation comes when you generate something that customers want (Desirable), something that should be done (Viable), and something that can be done (Feasible)? Based on this, we allowed each group to select two ideas from their matrix, regardless of the quadrant.

Visualize-the-Vote - A quick poll of collaborators to reveal preferences and opinions.

The 12 shortlisted ideas were voted upon to understand which ones had the most “D.V.F.”



# WHAT DO THE FINAL IDEAS REVEAL



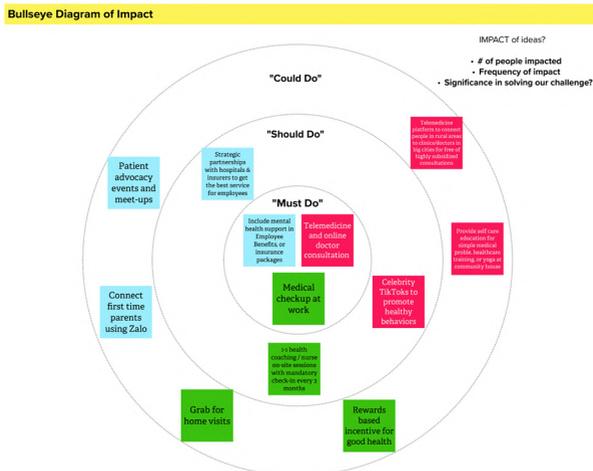
The ideas from this year’s Reimagining Healthcare workshop suggest shifts in the dynamics of Vietnam healthcare and new opportunities for players across the value chain. The success of these emerging models of care though shall depend on the possibility of seamless integration with hospitals, especially large public facilities, as well as payers, including employer-driven reimbursement programs.

## Consumerist trends shifting care outside hospital walls

Pre-pandemic, nearly 90% of care in Vietnam was dispensed through public hospitals. Against the backdrop of overcrowded facilities and increased affordability, patient expectations are rising, and the pandemic proved to be a catalyst to open new avenues of care.

With private investment, retail-based care is rapidly increasing with the emergence of pharmacy models to the growth in greenfield private clinics. As per Roland Berger estimates, nearly 14-17% of drug dispensing in Vietnam shall be through retail channels by 2028, compared to less than 3% today. State-owned and private entities are also taking notice of the growing health awareness, which has increased by 1.7x per various research, and the resulting need to deliver care beyond traditional means.

## “HOW MIGHT WE IMPROVE PREVENTATIVE CARE FOR VIETNAM’S WORKFORCE?”



## Digital health goes mainstream

In line with global trends, digital health has gone mainstream but what is noteworthy in Vietnam is the cross-industry collaboration being led by payers and pharmaceutical companies (“Pharmacos”). Globally, leading Pharmacos have taken an incremental approach towards embracing digital ecosystems, due to regulations and compliance concerns. While those concerns are shared in Vietnam as well, the focus on using digital health programs in sales and marketing initiatives demonstrates that these are now viewed as critical.

For example, one Pharmaco has launched a collaboration with a leading pharmacy chain and the Vietnam Young Physicians Association to bridge the gap in medical care through telemedicine, where visits to the pharmacy shall have complementary access to follow-up care through a telemedicine platform. Another example is a leading cardiovascular company that has launched a patient education program through a leading pharmacy’s digital platform, empowering patients with knowledge for self-monitoring of health conditions and to encourage early treatment-seeking behaviors.

Leaders from healthtech companies like the Hello Health Group and Docosan shared that they are in discussions with various Pharmacos and expect many such partnerships to take-off but also stressed on the need for sustainable operating models with continued collaborations and regulatory support.

Another area of digital health seeing encouraging growth is B2B eCommerce, especially in Northern parts of the country given the fragmented landscape. What has accelerated this growth is the ability to reduce the speed of ship-to-market by as much as 35-50% and passing the efficiencies to the pharmacies and hospitals in the form of lower sales prices. By early estimates, Gross Merchant Value growth in B2B eCommerce will be at a CAGR of 50%+ for the coming few years (starting from a low / non-existent base).



## Digital health is unlocking latent demand for women's health and mental health

The rise of digital health has helped those with less access to care find new sources. Leading among these are women's health and mental health, resulting in new solutions being launched. Some private payers have introduced AI-based programs to provide patients with access to self-help tools including mental health applications and options to seek support from healthcare professionals based on vital parameters.

Per a participant of the workshop, the founder of a new healthtech app in Vietnam, "60-70% of the users are women, and a significant number of them are seeking help for mental health issues." Solutions around the use of mental health in the workplace are also burgeoning with various participants finding resonance in the idea.

However, the big question—and one of the "Must Do" ideas generated in the workshop—is how might we include mental health support as an employee benefit or within insurance packages.

Employers and Pharmacos are both beginning to work with healthtech players on launching patient support and advocacy groups focusing on women's health issues. Case in point: Bayer Vietnam launched the #DontLiveWithPain campaign to raise awareness of endometriosis, which is a recurring disease in women, but early diagnosis and a regimen of long-term adjuvant medication can alleviate symptoms, especially pain. As part of the campaign, Bayer hosted a conference for patients to share their experiences of living with endometriosis while connecting with other patients. One of the speakers was the representative of the Facebook community of endometriosis patients with 4,000 members.





### **Preventative care on the rise**

A corollary of the strong hospital-centric care approach in Vietnam hitherto was that care was episodic and curative in nature. Self-help and increased use of precautionary measures for care are beginning to see an uptick. Post-pandemic, sales of nutrition and vitamin products have expanded in the range of 1.2-1.8x.

As Vietnam's workforce modernizes, better health is now being seen as a major productivity gain by employers, and they are willing to partner with payers and health platforms to drive preventative-based care. Leading private payers are investing in infrastructure to capture data from the use of wearables, self-reporting apps, and tracking tools to tailor products. Insurers also see partnerships with employers as a further critical step to not only help control rising costs of care but also improve healthcare outcomes for the insured.

### **Democratization of health in Vietnam**

Prior to the pandemic, a large volume and a significant value of healthcare was concentrated at providers in Tier 1 cities such as Hanoi and Ho Chi Minh City. With restricted movement during the pandemic, combined with increased affordability with the support of digital health and privatization, access to healthcare became more broad-based. Tier 2 cities like Hai Phong, Da Nang, and Can Tho are seeing increased healthcare spending.

Employers have picked up on this trend and are therefore demanding better onsite support, as well as connected and coordinated care in territories outside of Tier 1 cities. This has strong implications in terms of sales efficiency models of Pharmacos and consumer healthcare companies, which have historically focused their marketing efforts on Tier 1 consumers. Private providers are also repivoting towards growth in Tier 2 territories but also reevaluating if a super specialty approach is the right one.

# MOVING FORWARD

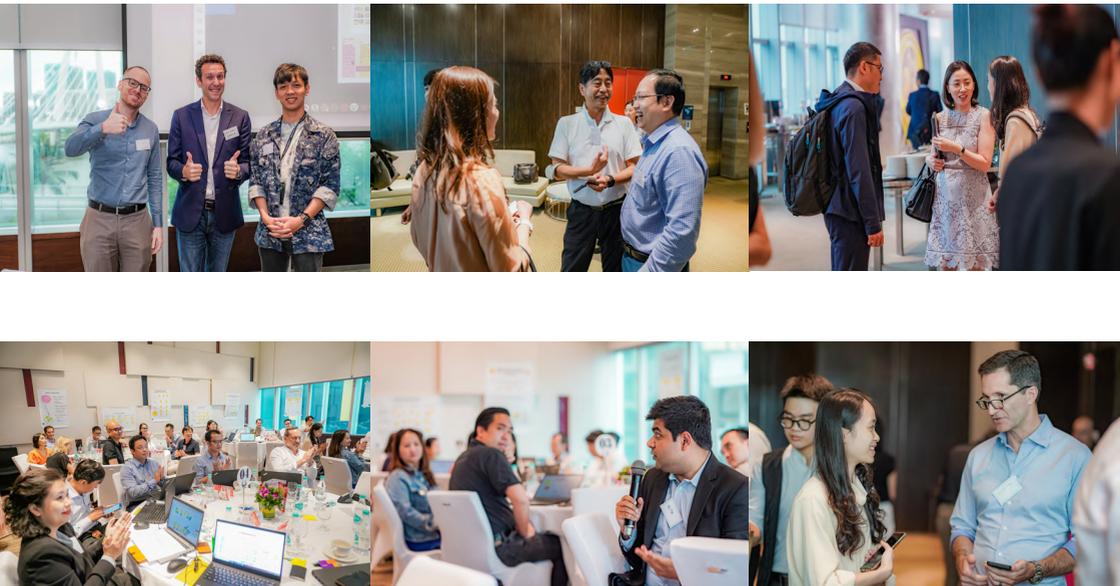
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The workshop was only a conversation starter, and there are key ingredients, from policy and regulations to operating models and capital, required to make the highlighted ideas sustainable and scalable.

As a forum, Reimagining Healthcare aims to bring together healthcare leaders from across the sector to showcase how a multistakeholder discussion can be leveraged to drive innovation in the industry. The format of the workshop stresses the need for stakeholders to remain patient-centric, requiring them to ideate solutions across the patient journey rather than through the constraints of their brand or with the expectation that patients alter their own natural course.

Many of the ideas that were generated at the workshop have been put into action in one form or another, which should signal to various players in the ecosystem that they're heading in the right direction. For those that have not yet been realized, our intention is that the ideas open up future possibilities or more divergent thinking into how we might provide better preventative care to Vietnam's workforce.



Businesses thrive when their employees lead happier, healthier, and more productive lives. While the loss of productivity due to sickness or disease has not been quantified in Vietnam, estimates in the United States place productivity lost to chronic disease at approximately 5% of GDP. Vietnam is a comparatively young and healthy country, yet the silvering of the Vietnamese population will present a Supercycle for increased demand. The percentage of the population over the age of 65 is set to triple over the next 20 years to nearly 20%.

We feel it a social imperative to reimagine how we might apply that ounce of prevention before we are forced to bear the cost of a pound of cure. Historically, investments in health have largely been limited to the traditional healthcare system and ignored where people spend most of their lives—at home and in the workplace. Most of the attention has been on traditional businesses such as hospitals and clinics, and not where we live, work, learn, and play—places that are becoming increasingly considered as the first mile of health.

As the healthcare industry undergoes increased “consumerization,” it is ever more important for practitioners to adopt a customer-centric mentality, which has not always been the status quo in a market dominated by public sector players. We were overwhelmed by the enthusiasm shared by participants in this year’s workshop and assert that we are on the cusp of a new era of healthcare delivery in Vietnam.

We look forward to being a pioneer in applying design thinking to solving unique issues within the industry and aim for an even more involved program in the coming year to address ever more critical issues. Please feel free to connect with us if you have any questions or comments that you would like to share.



# ABOUT THE ORGANIZERS

## Doodle

Doodle Design is a passionate team of Design Thinking Co-Creators, Designers and Facilitators. We are here to help like-minded clients innovate for impactful returns. Our “Co-Creation” and “Iterative” approach takes you closer to customers to make better decisions and deliver strategic and creative solutions for any challenges. A more customer-centric team. Break-through initiatives. Speed to market. We’re here to win together.

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## Papaya Insurtech

Papaya is Vietnam’s first fully digital third-party administrator with a focus on providing a seamless claims experience for health and life insurance partners. The company’s vision is to provide lifestyle continuity for Vietnamese families, protecting millions of individuals and families from the unexpected with sweet and easy insurance products. Papaya supports its insurance partners by providing their policyholders with digital claims processing capabilities and online support throughout their healthcare journey.

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## Roland Berger

Roland Berger is a leading global strategy firm with successful operations in all major international markets. In Vietnam, we have a strong track record with clients from diverse sectors and notable public sector projects. We have also supported leading players across the healthcare value chain on strategic, commercial, and operational topics.

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## Viet Capital Asset Management

Founded in 2006, Viet Capital Asset Management is a local asset management firm with investments in healthcare, education, technology and diversified public equities. The company launched a dedicated healthcare investments platform in 2008 and is currently focused on early-stage growth capital investments with a vision to create more equitable access to care for millions of Vietnamese.

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THANK YOU :)

