

1 Data & Analytics

Leveraging data (especially clinical) to manage health and drive individual, provider and payer decisions.



Hospital EHR Adoption



Growth of Electronic Health Records (EHR's) enables unprecedented access to clinical data.

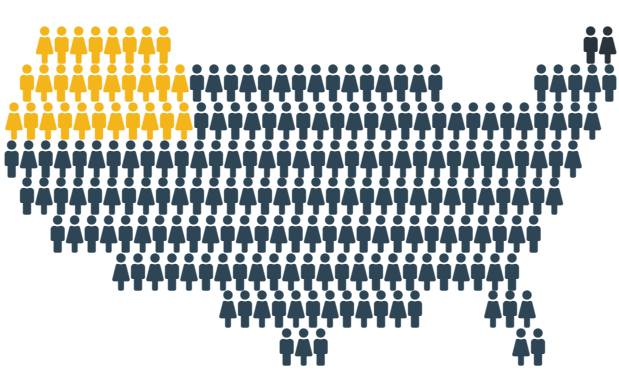
<https://dashboard.healthit.gov/evaluations/data-briefs/non-federal-acute-care-hospital-ehr-adoption-2008-2015.php>

2 Total Consumer Health

Improving members' overall medical, social, financial, and environmental well-being.



Understanding of Co-Pay, Co-Insurance, Deductible and Out-of-Pocket Cost



Only 14% of Americans aged 25 to 64 understand meaning of deductible, co-pay, co-insurance, and out-of-pocket cost.

<http://www.consumerhealthalliance.org/25-health-care-facts-and-statistics/>

3 Population Health Services

Operationalizing community-based health strategy, chronic care management, driving clinical integration, and addressing barriers to health such as social determinants.



Primary Barriers to Pursuing Population Health

- Potential Threat of Financial Losses
- Unsure of When to Make Transition
- Issues with Internal Systems
- Difficulty in Modeling Cost of Care
- Difficulty in Changing Culture
- Resistance from Leadership



The potential threat of financial loss is increasingly seen as a significant roadblock.

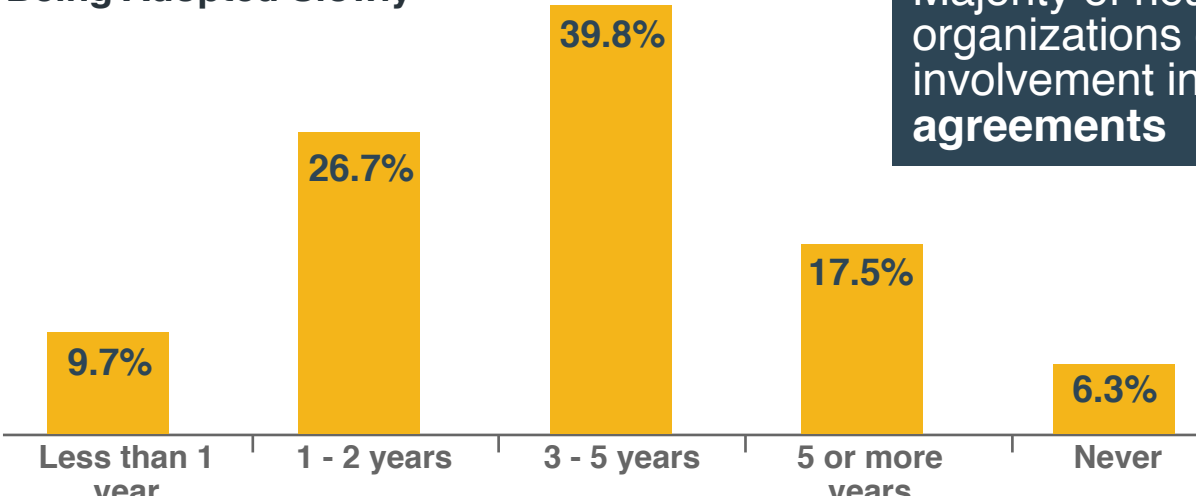
<http://info.nai-consulting.com/acton/attachment/5655f-0033/1/-/-/Numerof%20Population%20Health%20Survey%20Report%20-%20April%202018.pdf>

4 Value-based Payments

Transitioning to and targeting specific medical conditions to manage cost and improve quality of care.



Value-Based Contracts Are Being Adopted Slowly



Majority of healthcare organizations over-estimate involvement in risk-based agreements

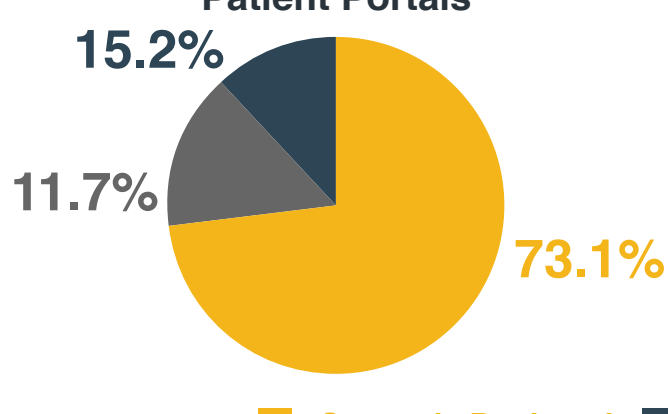
https://hceg.org/wp-content/uploads/Change_Healthcare_Industry_Pulse_2019_Digital.pdf

5 The Digital Healthcare Organization

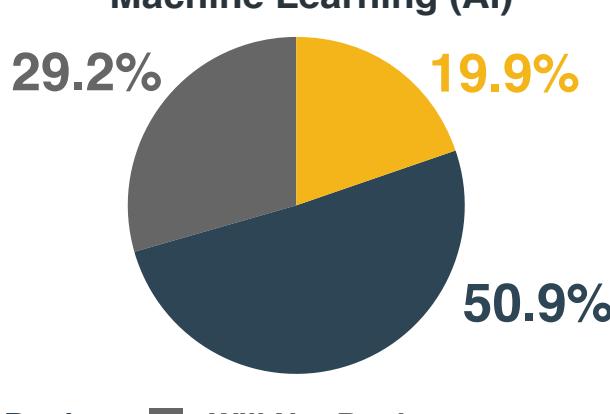
HSAs, portals, patient literacy, cost transparency, digital payments, CRM, wearables and other patient-generated data, health monitoring, and omni-channel access/distribution.



Patient Portals



Machine Learning (AI)



Legend: ■ Currently Deployed ■ Plan to Deploy ■ Will Not Deploy

https://hceg.org/wp-content/uploads/Change_Healthcare_Industry_Pulse_2019_Digital.pdf

6 Rising Pharmacy Costs

Implementing strategies to address growth of pharma costs along with benefits to quality of care and to total healthcare costs.



In 2020, **9 of the 10** best-selling drugs by revenue will be **specialty drugs**, compared with 3 out of 10 in 2010, and 7 out of 10 in 2014.



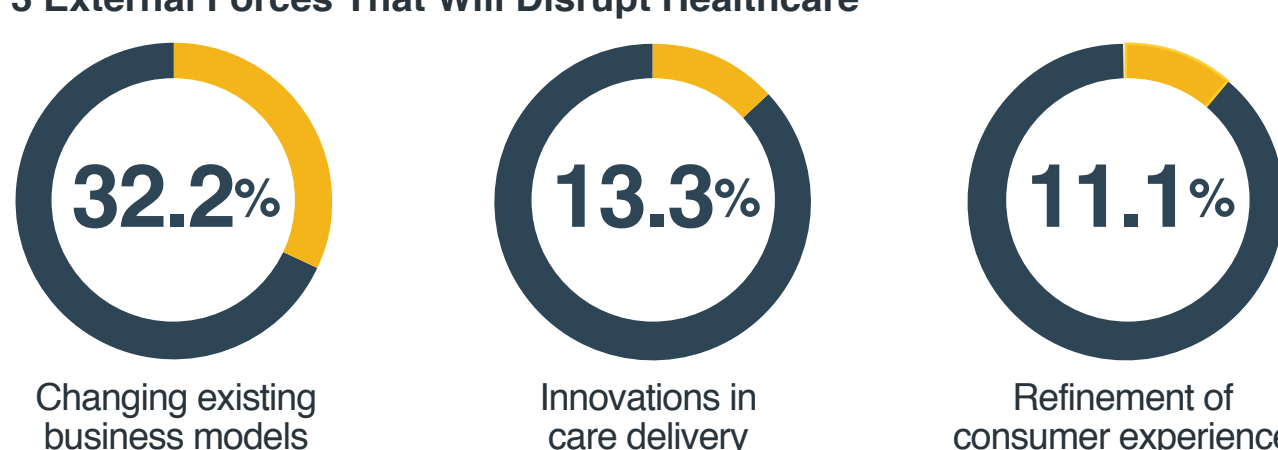
<https://www.drugchannels.net/2015/07/pharmas-bright-future-meet-top-10-drugs.html>

7 External Market Disruption

New players like Amazon, Chase, Apple, Walmart, and Google.



Top 3 External Forces That Will Disrupt Healthcare



https://hceg.org/wp-content/uploads/Change_Healthcare_Industry_Pulse_2019_Digital.pdf

8 Operational Effectiveness

Implementing lean quality programs, process efficiency (with new core business models), robotics automation, revenue cycle management, real-time/near-time point of sales transactions, etc.



What Healthcare Executives Say



Percentage of executives ranking **Data Analytics** as extremely or very effective in improving operational effectiveness and efficiency

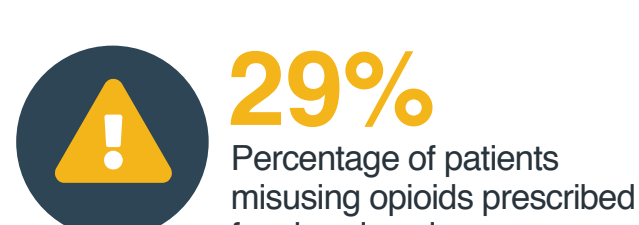
Percentage of executives ranking **Analytics** as extremely or very effective in **empowering more productive providers**

Percentage of executives ranking their **organization's** as being very efficient

https://hceg.org/wp-content/uploads/Change_Healthcare_Industry_Pulse_2019_Digital.pdf
<https://www.healthcarefinancenews.com/news/health-insurers-say-automation-needed-operational-efficiency>

9 Opioid Management

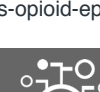
Developing strategies for identifying and supporting individuals and populations struggling with substance abuse/addiction or at risk of addiction.



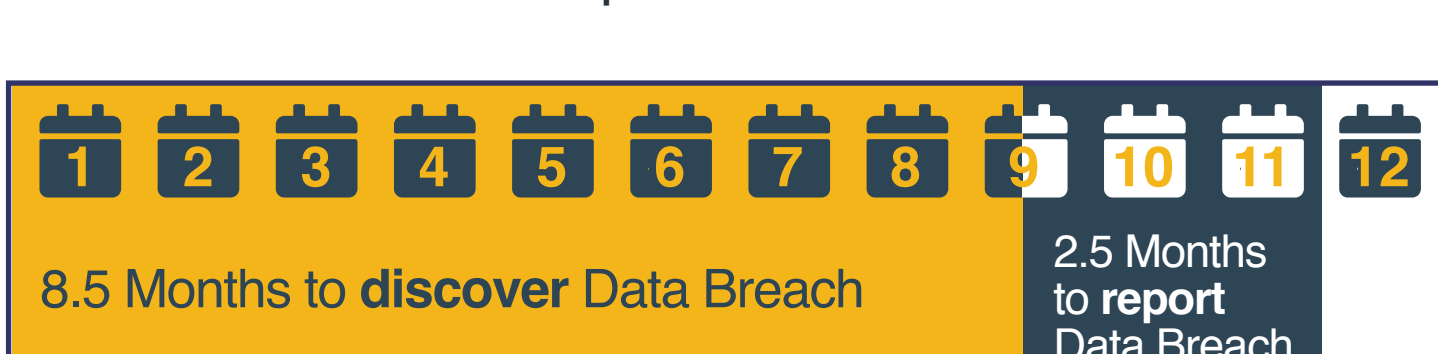
<https://www.drugabuse.gov/drugs-abuse/opioids/about-america-overdose-crisis>
<https://www.moveforwardpt.com/Resources/Detail/7-staggering-statistics-about-america-s-opioid-epi>

10 Cybersecurity

Protecting the privacy and security of consumer information to maintain consumer trust in sharing data.



Months it Takes to Detect and Report a Data Breach



<https://www.hipaajournal.com/2019-data-breach-barometer-report-shows-massive-increase-in-exposed-healthcare-records/>