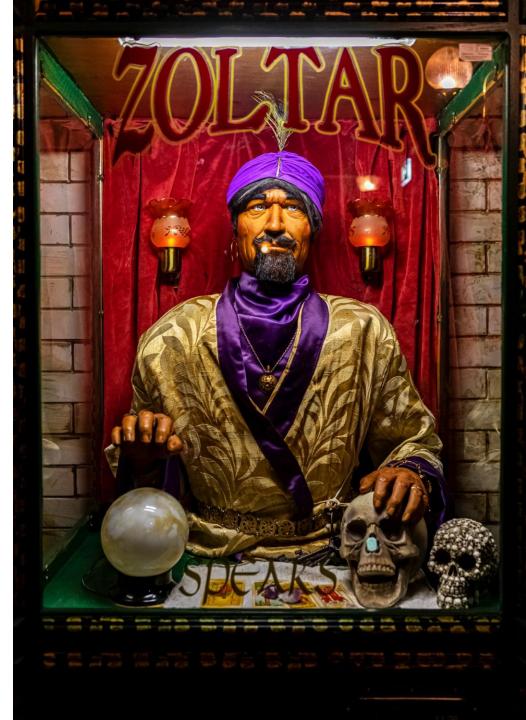
Future of Health Trendspotting

'Omnichannel' care delivery, direct-to-patient care models, and the 'nouveau' health IT infrastructure crowd

Jessica DaMassa







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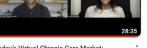
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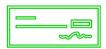
State-of-Play



Trouble for **hospitals** seeking to reinvent their business models amid consolidation, closures, ballooning staff costs and an onslaught of competition



Big Pharma co's that are building out telehealth, digital health, & DTx models as ways to more easily get their drugs in the hands of US consumers



Payers diving into care delivery – becoming "pay-viders!" – in a desperate attempt to improve shrinking margins



An empowered retail health sector that became "essential" for Covid shots and pharmacy delivery, now turning into growing healthcare delivery orgs



After "the best years ever" for health tech, telehealth, & other digital health startups...drop in funding dollars, downsizings, de-listings, & drama



The rise of the "healthcare consumer," who was forced to take on more responsibility for their healthcare than ever before...but is fatter, sicker, and more mentally vulnerable than pre-pandemic

What's happening <u>NOW</u> that will change how healthcare is going to be delivered in the next 3-5 years?

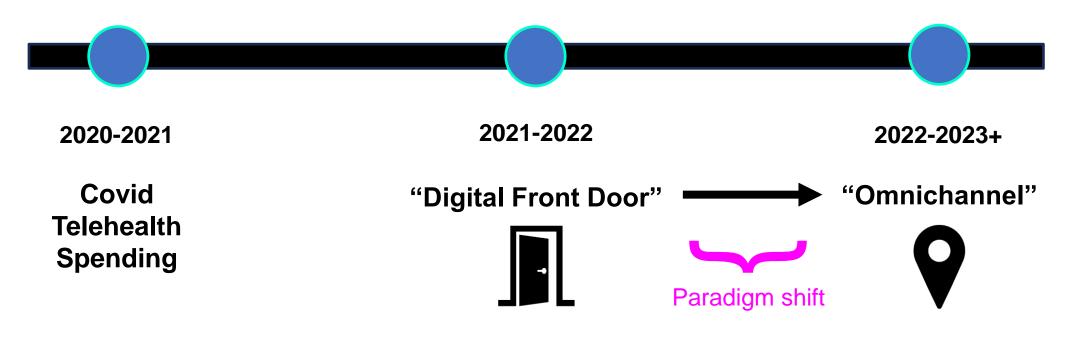
TREND#1



The Omnichannel Care Strategy



Evolution of Digital Strategy

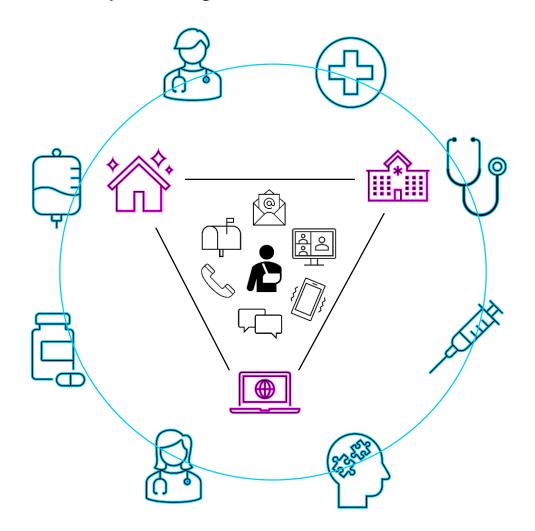


Virtual as **a way into** the health system

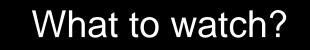
Virtual as its **own place** in the health system

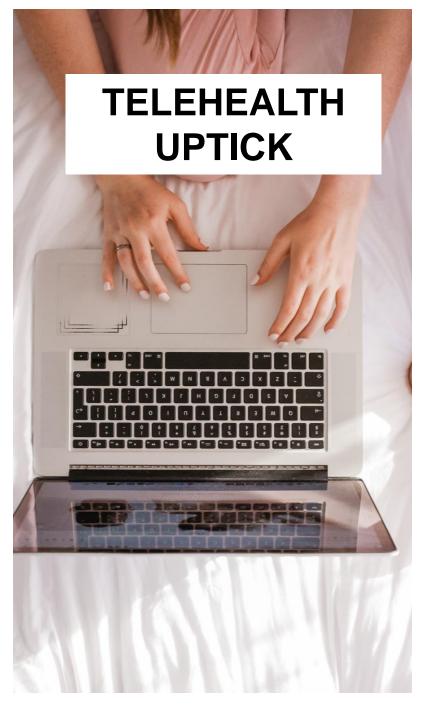
Omnichannel Care Strategy

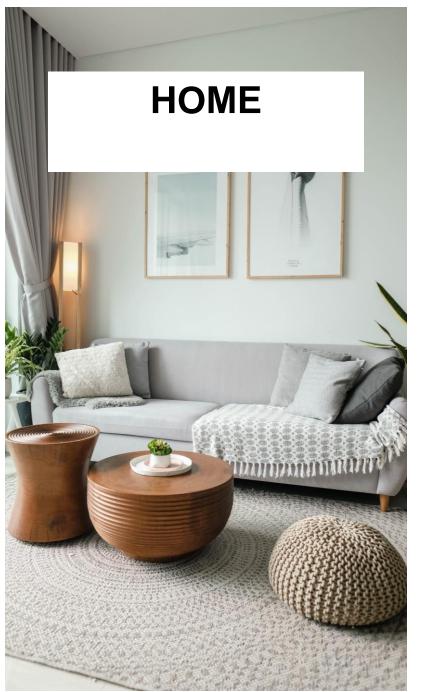
Expands access to care by creating new channels to access it onsite, online, and in the home

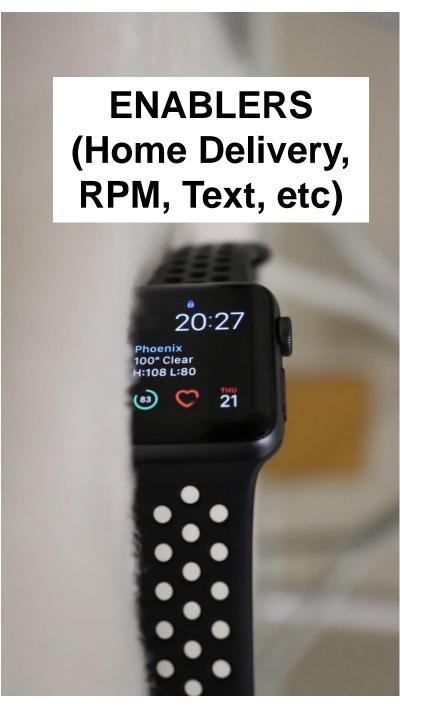


- Channel is matched to acuity with appropriate care provider
- Can be synchronous or asynchronous
- Patient-centric not system-centric







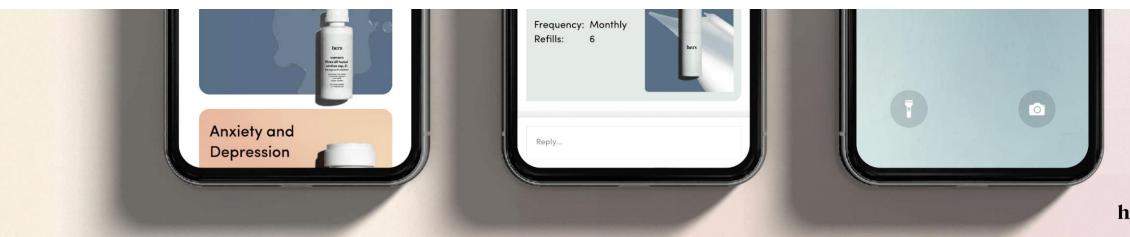


TREND#2

...enabling the health experience of the future that modern consumers expect



Direct-To-Patient Care Models



Direct-to-Patient Care Model

Principles: Direct-to-Patient companies are those that...

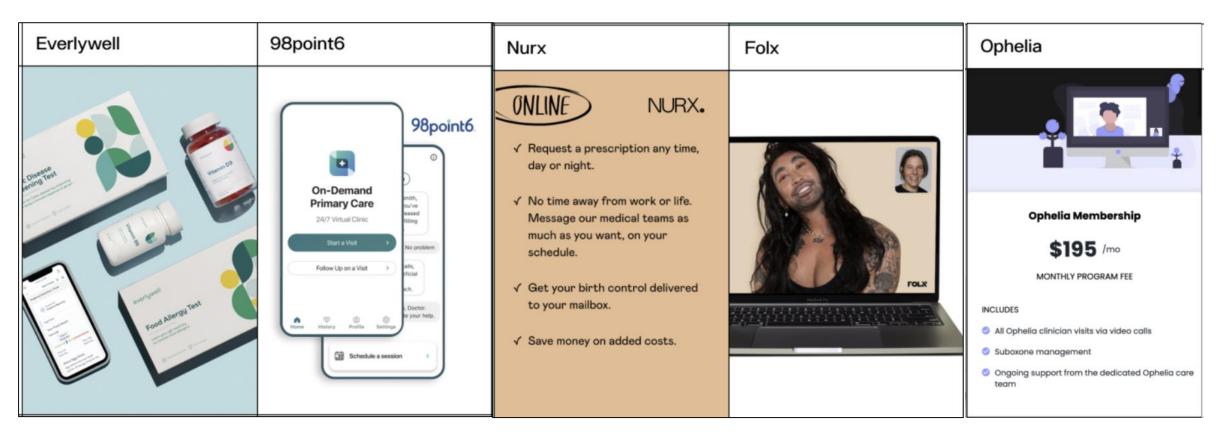




Changing Cost of Care

- No (or limited) brick-and-mortar footprint
- Telehealth based
- Flexible staffing
- Tech that streamlines operations, triaging, fulfillment and more
- Direct relationships with drug manufacturers
- No need to contract with payers, but many do...or will!
- National market

What kind of care?



At Home Labs

Primary Care

Birth Control & Sexual Health

Gender Affirming & LGBTQ+ Care

Mental Health & Substance Use Disorder



CVS

- \$10.5B acquisition of Oak Street Health, primary care clinic catering to seniors
- \$100M investment in Carbon Health (primary and urgent care)
- \$8B acquisition of home health provider Signify Health

Walgreens

- Majority investor in VillageMD (\$6B), a primary care clinic with 400 locations, now including 200 attached to Walgreens' drugstores
- VillageMD is buying Summit Health for \$9B
 (Walgreens invested in transaction along with Cigna's Evernorth) to gain 280 clinics
- Majority investor in CareCentrix to extend into home care & post acute care management



Walmart Health / UnitedHealthcare

UnitedHealthcare members have access to 24/7 Virtual Visits to feel better faster

If you have UnitedHealthcare insurance through your employer, you can get affordable, timely virtual urgent care for colds, flus and other minor illnesses and injuries via Walmart Health Virtual Care — anytime, anywhere.

Simply access Walmart Health Virtual Care from your phone, tablet or computer to securely connect with a trusted medical provider, then receive convenient and high-quality treatment, care coordination and more for one low out-of-pocket cost.

Get care now

(i) If this is a medical emergency, please call 911. For mental health emergencies,



• 77 Health Centers by end of 2023

Walmart

- Acquired MeMD telehealth startup in May 2021 to offer virtual urgent, behavioral and primary care
- "Official" telehealth provider for UnitedHealthcare, US's largest payer





4,500+ Locations Spring staples in sizes 14+

Swim

Shop with Prime Try Before You Buy

Intimates

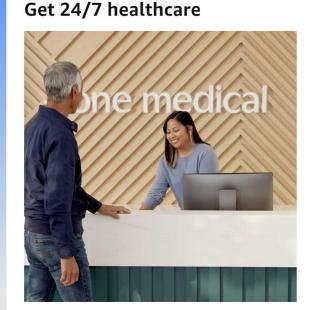
Shop tops

Dresses

24/7 care with One Medical



Customer Service Best Sellers Amazon Basics Prime Vew Releases Today's Deals Music Books Registry Fashion Amazon Home Pharmacy



Join now, \$144 for a year

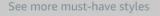
amazon

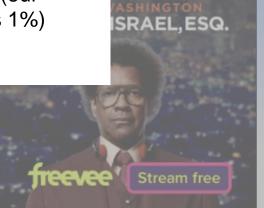
- Acquired One Medical for \$4B
- One Medical gives Amazon a physical footprint of 188 offices & employer clients
- Amazon Prime Rx Pass unlimited generic drugs for \$5/month
- 44% of Americans have an active Amazon Prime membership (our largest health system serves 1%)

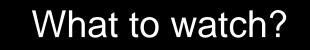
best experience

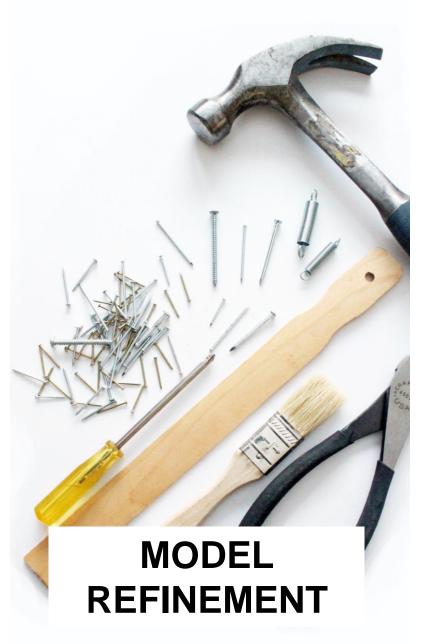
n securely

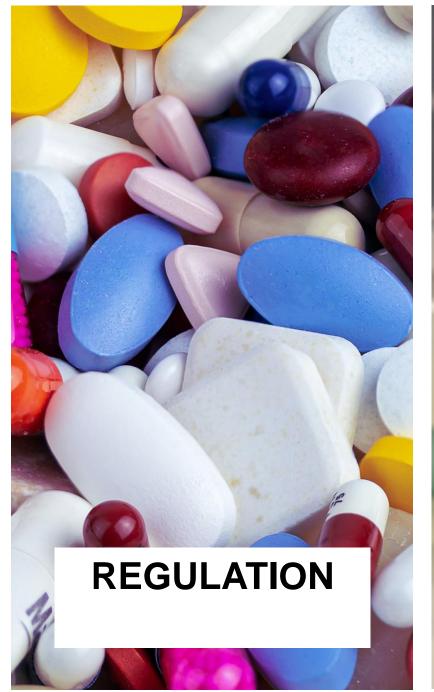














TREND#3



The "Nouveau" Health IT Infrastructure Crowd



What does the IT system for the future of healthcare look like?



Epic ORACLE Cerner



CDSI_m MEDITECH

"Layer on Top" Companies



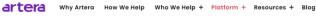


What is KeyCare?

KeyCare is an Epic-based virtual care platform designed to help forwardthinking health systems improve access and quality by expanding their virtual care options for patients.

KeyCare enables health systems to easily augment their care teams, optimize capacity, and widen their digital front doors by offering access to an independent, nationwide network of urgent care and behavioral health providers who work on an instance of Epic optimized for virtual care. KeyCare intends to add other virtual care specialties in the future.





Request A Demo

WHY ADTEDA

The Artera Difference

Meaningful patient communication requires conversations. Here's what it looks like to go beyond the basics with Artera.



Conversational Messaging

Empower patients to engage your team the same way they do with their family - emojis and all 🤞.



Inbound Automations

Set up automated responses to common questions, like directions to your facilities or office hours.



Intelligent Analytics

For more complex needs, your helpful staff can be pulled in to give that personal touch to your patients.



AI-Enabled Conversations

Multi-step pathways provide patients with immediate responses without waiting for available staff.



Flexible Integration

Use your EHR & IT solutions to trigger conversations through your phone number.



Vendor Support

But, we're still here offering top-rated support if you get stuck or want to set up something new



Staff Escalations

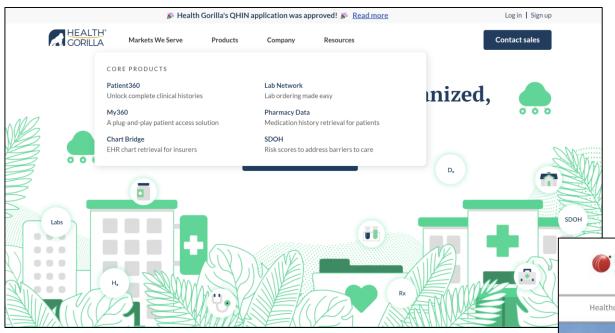
Powerful reporting with data transparency and customization options to inform unique insights.

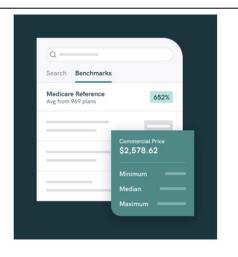


Self-Service

Set up outreach triggers, adjust messages, and more without vendor intervention.

"Move & Analyze Data" Companies





Spend time learning from data, not wrangling it.

For decades, health organizations have relied on incomplete market intelligence derived from siloed claims data. These products come with usage restrictions, poor coverage, and black box methodologies. On the heels of price transparency legislation, we've enabled over one hundred organizations to better analyze the cost of care.



US - English >

Tokenization Use Cases



Hospital data.

Hospital list and cash prices, plus charge information like description, place of service, or NDC.

+

Payer data. Fees for practioners

Fees for practioners and medical groups, plus rates for imaging centers, ASC, DME, labs, and behavior health.

*

Professional data.

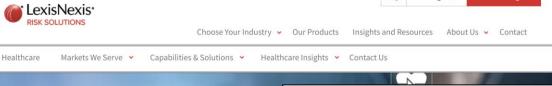
Rates for hospital-employed professions from both payer and provider disclosures.

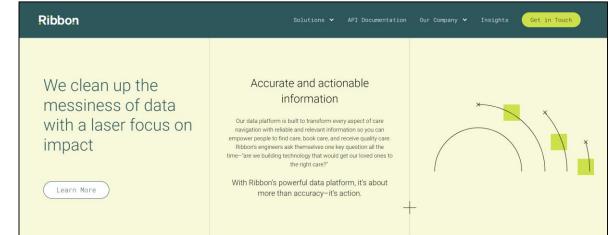


Drug and device data.

Product Sign In

Unprecedented prices and margins for hospital-administered drugs and devices







Identify market opportunities and mitigate risk exposure.



Life Sciences Organizations

- Better plan clinical trial protocol
- design, resources, and support

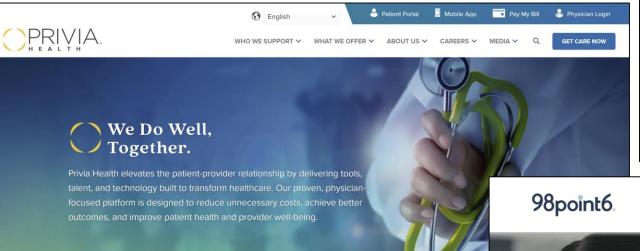
 Observe real-world outcomes beyond
- Expand follow-up data on trial
- Expand follow-up data on t participants
- Ensure diverse representation of eligible trial participants

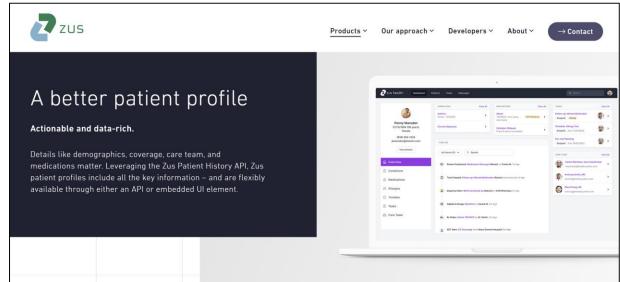


Health Data Providers

- Match records across datasets with precision
- Gain a longitudinal view of patient journeys
- Combine your data with other relevant datasets to enable new use cases

"DIY EMR" Companies







About Us Results Contact us

Digital healthcare for a competitive edge

License the cloud-based 98point6 Technology Platform to enable premium digital care experiences for your patients and providers.

Expand your virtual clinic with technology designed by clinicians for clinicians to enhance delivery of high-quality, personalized care—and capture more revenue.

Get started >

"And Both" Companies

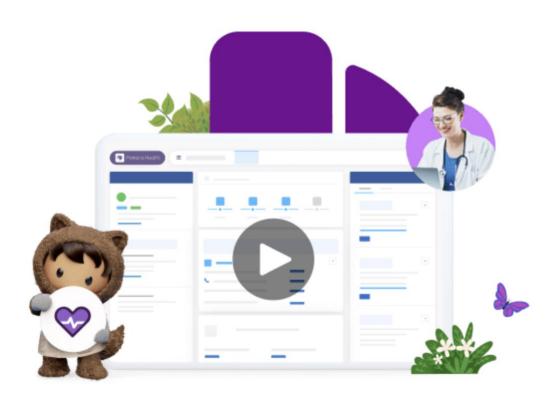


See how you can decrease in operational cost by 25%.

The right technology lets your health organization rally employees around a single view of every patient, member, provider, and partner to deliver more effective and efficient care and services.

Learn how Customer 360 for Health can help your organization:

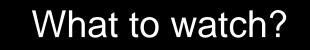
- ✓ Lower costs and improve care access with automation
- ✓ Personalize health experiences with intelligence
- ✓ Deliver care and service in real time

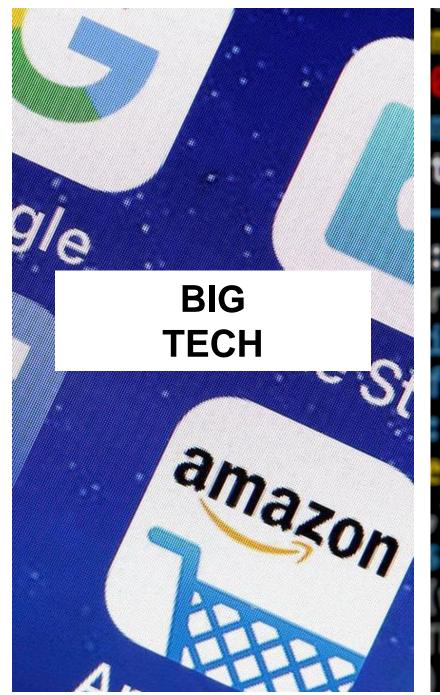


Customer 360 for Health

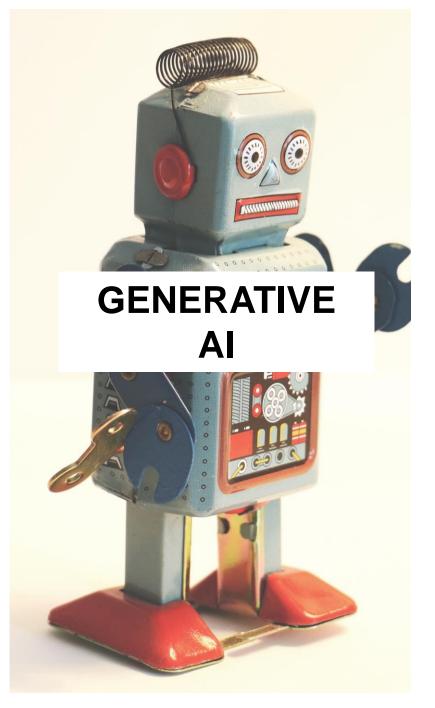
Scale experiences, increase efficiencies and deliver better care and service with a single, holistic view of every patient, member, provider, and partner.

- Lower costs and automate health team workflows
- Personalize health experiences throughout care journeys
- Deliver individualized care and service in real-time, from anywhere









WHAT'S THE FUTURE?

WALTH HEALTH

WHAT'S THE FUTURE?

www.WTF.health www.youtube.com/WTFHealth