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# American Well

**Ido Schoenberg, MD**  
Chairman & CEO

# American Well Uses Technology To Bring Patients and Providers Together

## Providers

## Patients



# ... With Exponential Growth In an Accelerating Telehealth Market

*Assuming only 10% Market Penetration*

**\$5.7 billion**

**Opportunity for Current  
Conditions**

(Acute, Behavioral)

**\$12.5 billion**

**Opportunity for Future  
Conditions**

(Chronic)

Source: Cowen and Co



# TeleHealth in Every Home



# Core Relationship

Patient Doctor






**Connect Now**

**Not a callback model**






Marie Lopez | Last Login 3/12/13 | Available (Web) | Help | Log Out

My Practice
Administration
Test My Computer
4
Wrap ups
Patients waiting

### Review Conversation Details

**Conversation with Katherine L. Smith - Female, Age: 42**

Scheduled for 4/12/2013, 4:15 pm PST

**TOPICS: Headaches, Flu**  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

**Payment Summary:**

Direct Payment \$10.00

Health Plan Benefit \$60.00

**Total Payment to You \$70.00**

**Phone Options**

Enter the phone number where you can be reached during the visit. This number will be used if a phone connection is needed, and will not be shared with the patient.

Phone Number:  -  -

Decline
Connect

**Triage Questions**

Lorem ipsum dolor amet consectetur adipiscing elit?  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet. Magna aliquam erat volutpat. Ut wis enim ad minim veniam, quis nostrud.

Nonummy Consectetur nibh euismod tincidunt ut laoreetisismod tincidunt?  
 Laoreet dolore magna aliquam erat volutpat. Ut wis enim ad minim veniam, quis nostrud exerci tation.

Dolor sit amet, consectetur adipiscing elit?  
 Consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

**Review Health Summary**

**Betty Peterson**  
 Gender: Female Age: 35

Conditions				
Description	Orig. Diag.	Lastest Diag.	Current?	
<input checked="" type="checkbox"/> Pneumonia due to parainfluenza virus	2007	2007	No	
<input checked="" type="checkbox"/> Diabetes - Type II (Adult Onset)	1997	2008	Yes	Self Reported
<input checked="" type="checkbox"/> Polycystic Ovarian Syndrome	1996	--	Yes	Self Reported

Medications				
Description	Date Presc.	Status	Prescribed By	Current?
<input checked="" type="checkbox"/> <b>Cyclobenzaprine</b> HCl, 50mg Tab, BID, for 3 weeks, 2 refills	2/5/2008	Filled - 2/5/2008	Julius Irving, MD	Yes
<input checked="" type="checkbox"/> <b>Alprazolam</b> 50mg Tab, 1 tab BID, as needed for anxiety, disp as written, 2 refills	12/5/2007	Filled - 12/5/2007	Julius Irving, MD	Yes
<input checked="" type="checkbox"/> <b>Ibuprofen</b> 200mg Tab, 2 tabs QID, as needed	11/21/2007	Prescribed	Julius Irving, MD	Yes
<input checked="" type="checkbox"/> <b>Codexone</b> 300mg Tab, 2 tabs QID, for 3 weeks, disp as written, 2 refills	6/12/2007	Filled	Julius Irving, MD	Yes
<input checked="" type="checkbox"/> <b>Doxycycline</b> 100mg caps	--	--	--	Yes Self Reported

Allergies		
Description	Onset	Current?
<input checked="" type="checkbox"/> Peanut - anaphylaxis	2002	Yes
<input checked="" type="checkbox"/> Grass Poll - Meadow Fescue, Std	1985	Yes Self Reported

Immunizations	
Description	Date
<input checked="" type="checkbox"/> Tetanus	1998
<input checked="" type="checkbox"/> Influenza Vaccine, Live, Intranasal	2008
	Self Reported

Procedures	
Description	Date
<input checked="" type="checkbox"/> Colonoscopy	2/5/2008
<input checked="" type="checkbox"/> Appendectomy	5/31/1998
<input checked="" type="checkbox"/> Appendectomy	4/1/1998
	Self Reported

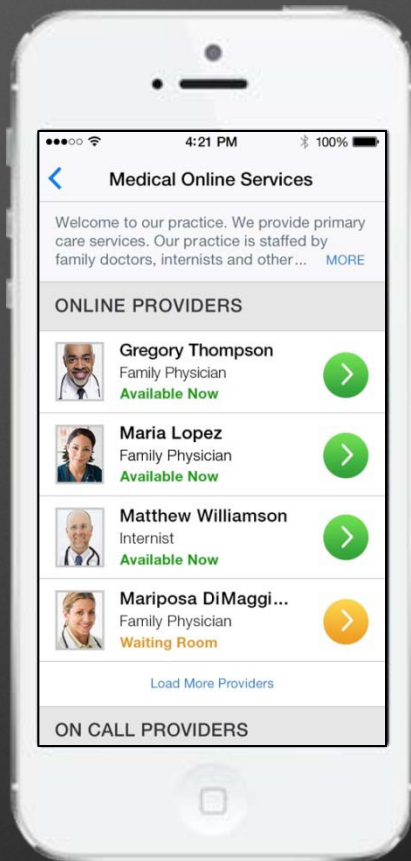
This health summary may not include sensitive health information, such as information related to HIV, AIDS, mental health, or substance abuse. This summary is updated periodically, and may therefore be out of date. The information listed here should not be considered a complete medical record or health history.

AMERICAN WELL

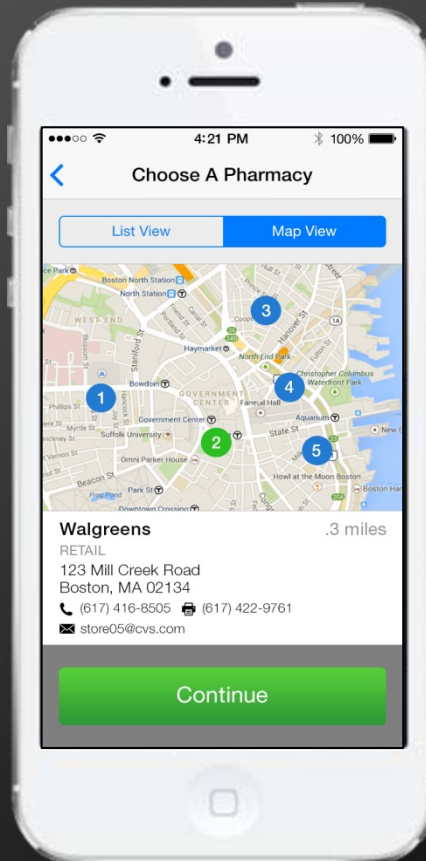
© 2015 American Well Corporation | Confidential

6

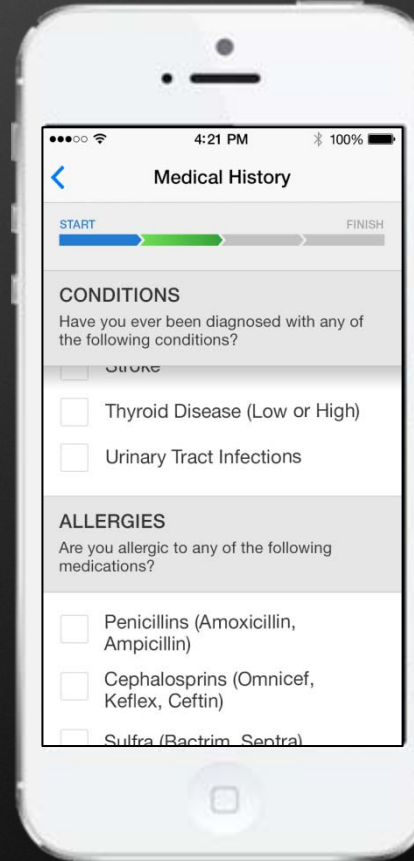
Provider Selection



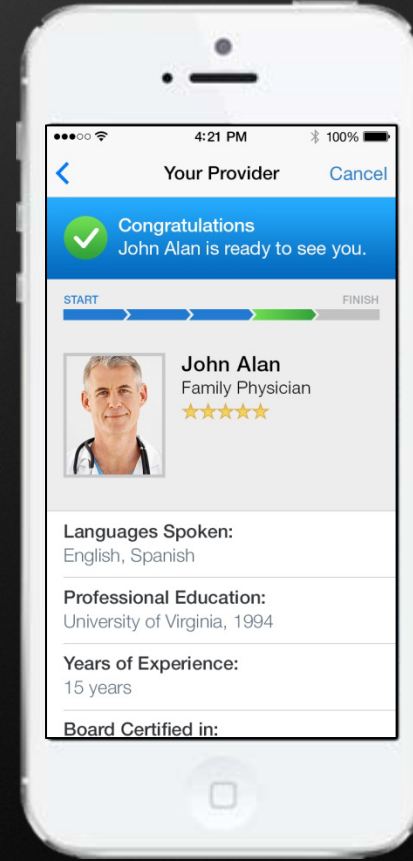
Pharmacy Selection



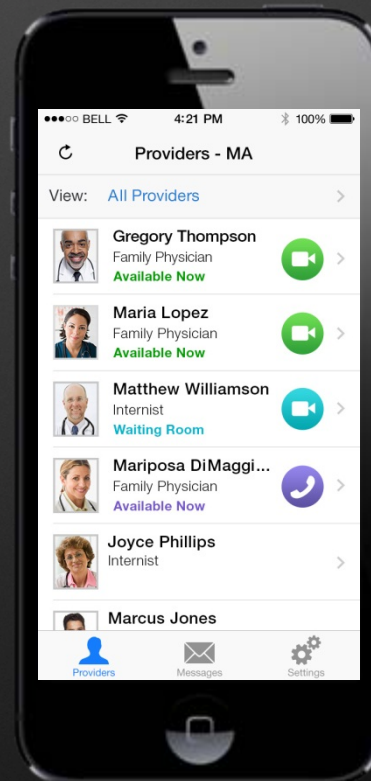
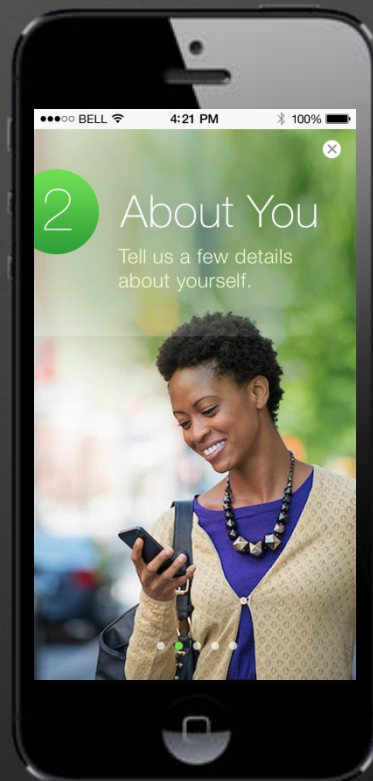
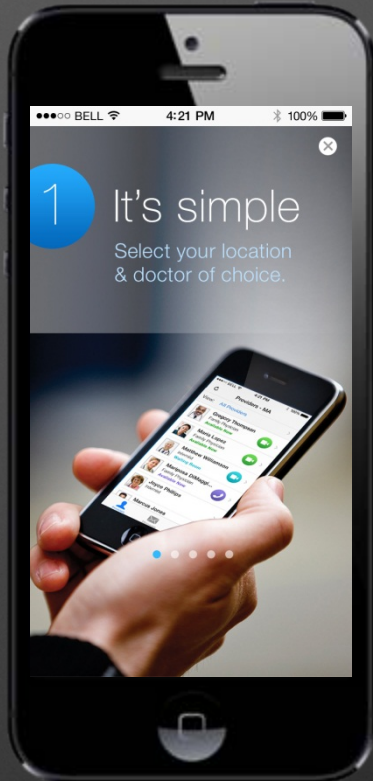
Clinical Intake



Visit Options







# All Stakeholders Are Critical

## Patients

- Convenience
- Affordability
- Choice
- Quality

## Providers

- Expand revenue
- Increase productivity
- Benefit, not suffer from technology
- Participate in risk
- Improve lifestyle

## Employers

- Reduce medical costs
- Improve employee productivity
- Attract & retain employees

## Payers

- Grow membership
- Grow groups
- Reduce costs
- Align risks & incentives

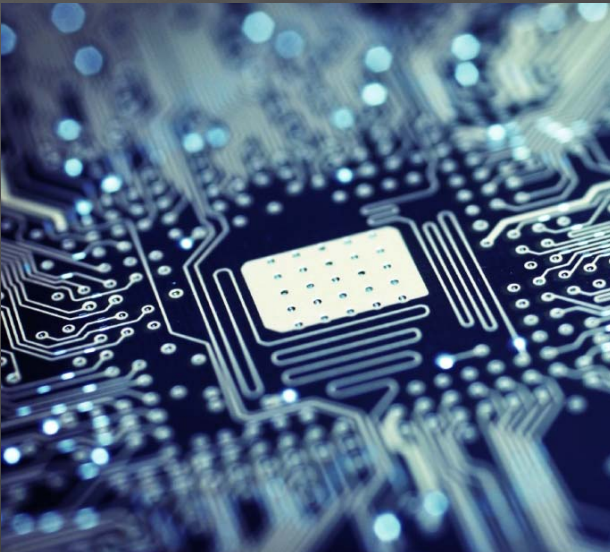
## ACO

- Coordinate efficient & high quality care
- Manage & assume risk

## Government

- Population Health
- Improve quality, cost, and access
- Multiple roles (payer, regulator, largest employer)

# Market Leading Capabilities



TECHNOLOGY



SERVICES



BRAND



# ... Connecting a Network of Providers, Health Systems, Payers and Employers

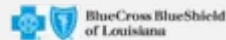
## Delivery Systems World class medical centers



Carolinan HealthCare System



## Health Plans Over 100M covered lives



## Employers Over 1,000 large groups



# Leading Telehealth Brand



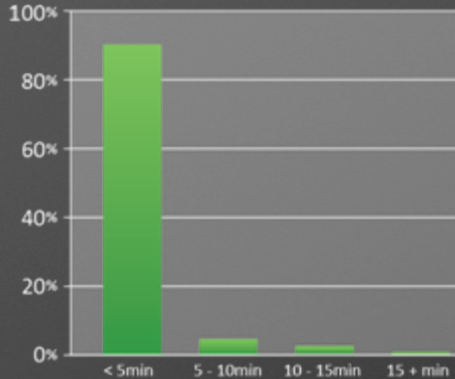
## Most popular DTC app

Amwell is a Top 5 medical app for Apple and Android, with a patient panel of over a million.

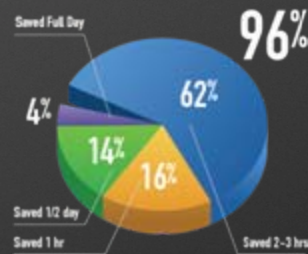


# American Well's customers get results

AVERAGE WAIT TIME < 2MINS



EMPLOYEES SAVED TIME

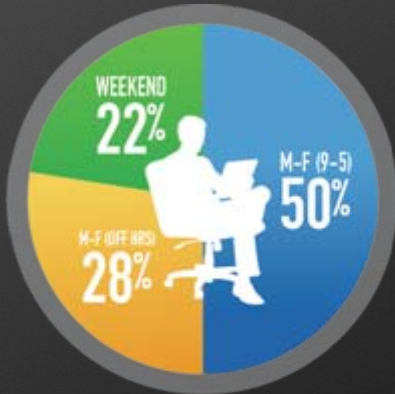


**4.7**

OUT OF 5 STARS



Patient satisfaction rating with American Well



VISITS HAPPEN WHEN EMPLOYEES NEED IT



RESOLVED  
THE PATIENT'S ISSUE  
COMPLETELY

EACH TELEHEALTH  
VISIT SAVES





# Explosive Growth - 2014

## Website Traffic



## App Downloads



## Enrollments



## Consults



## Consumer Satisfaction



## Customer Acquisition Cost



## Revenue



## B2B Clients



## Number of Employers





The champions of Z Pack?!



# Providers are key!

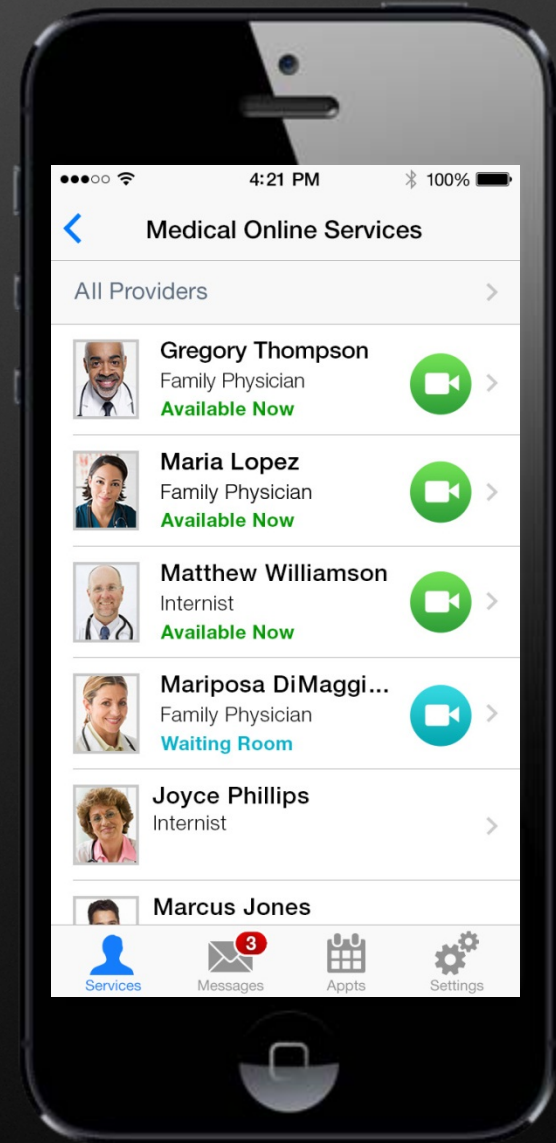
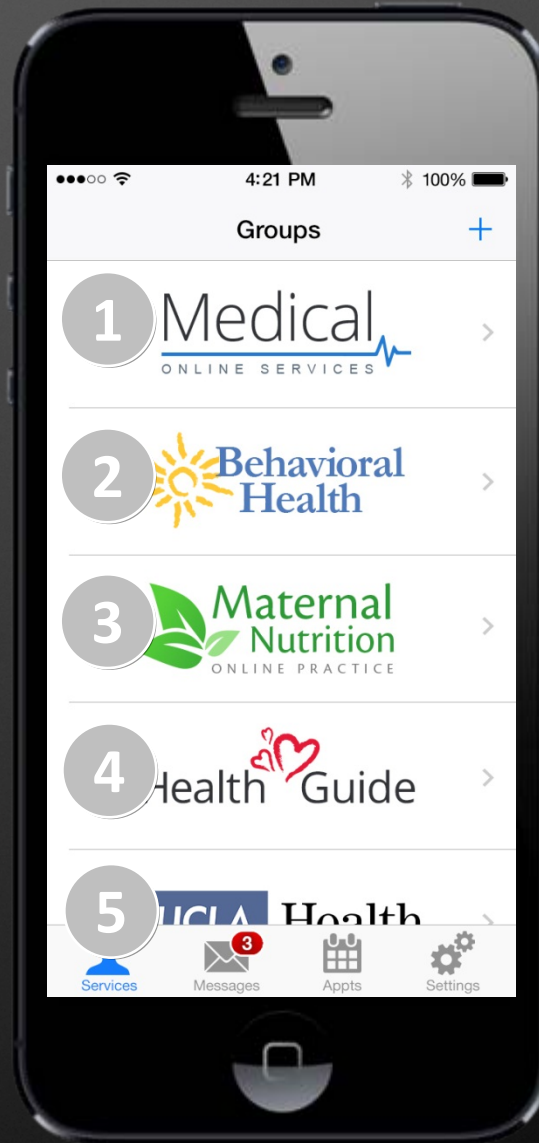
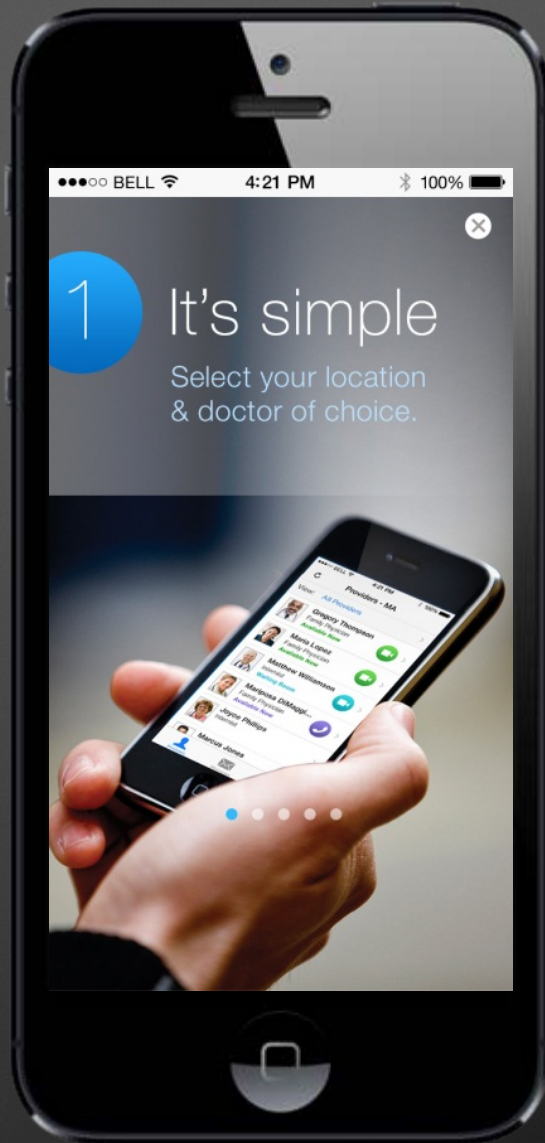
## Patient



## Doctor

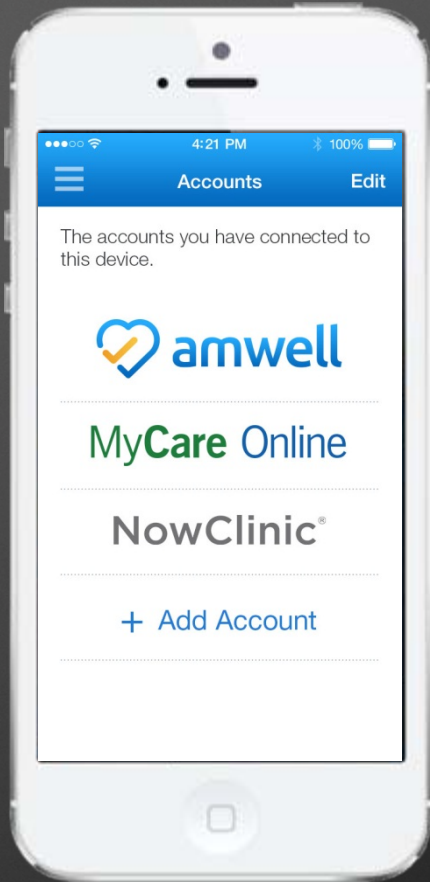




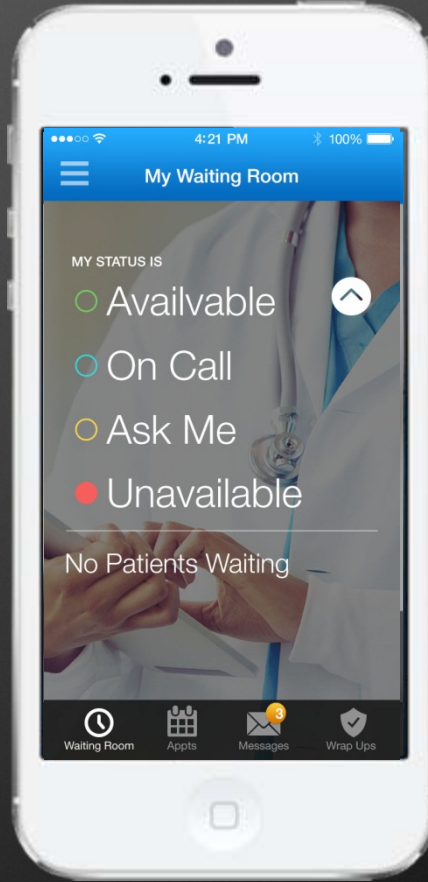


# The Mobile Practice – One Stop Shop -

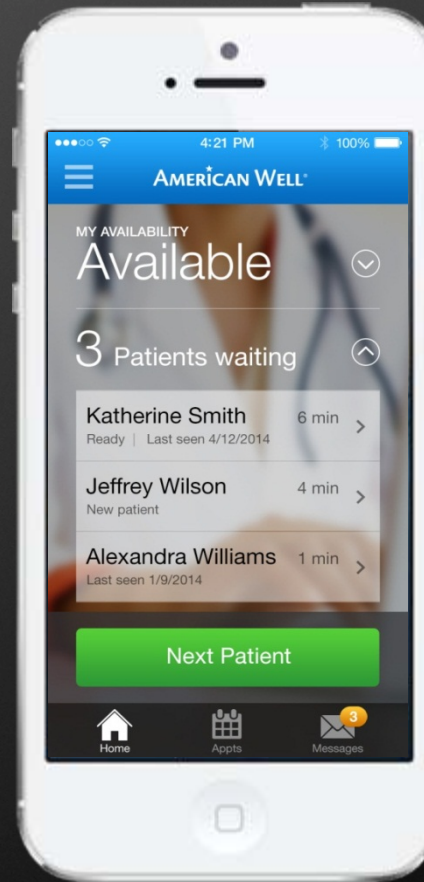
## Cross Networks



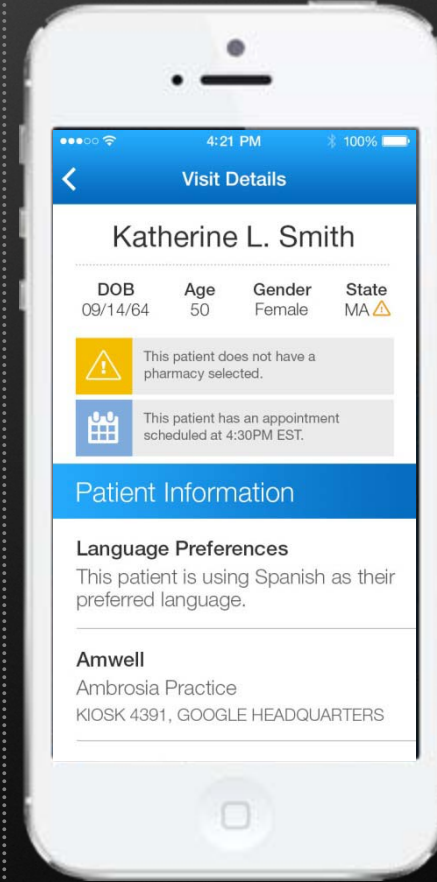
## Manage Availability



## Patient Traffic

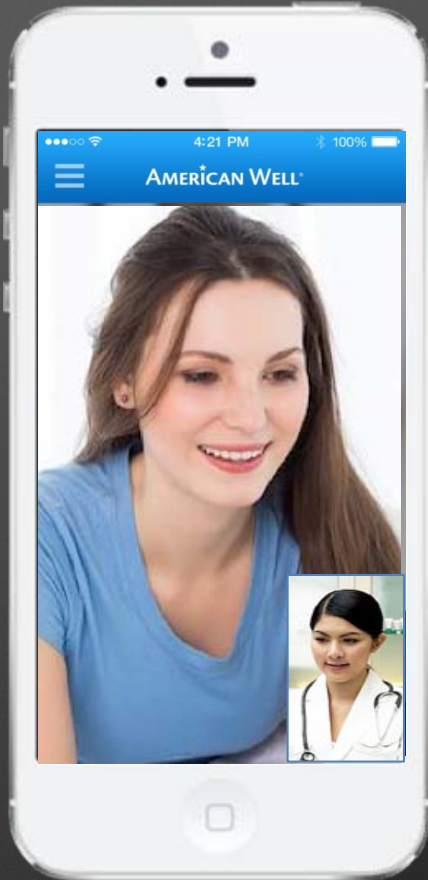


## Review Chart

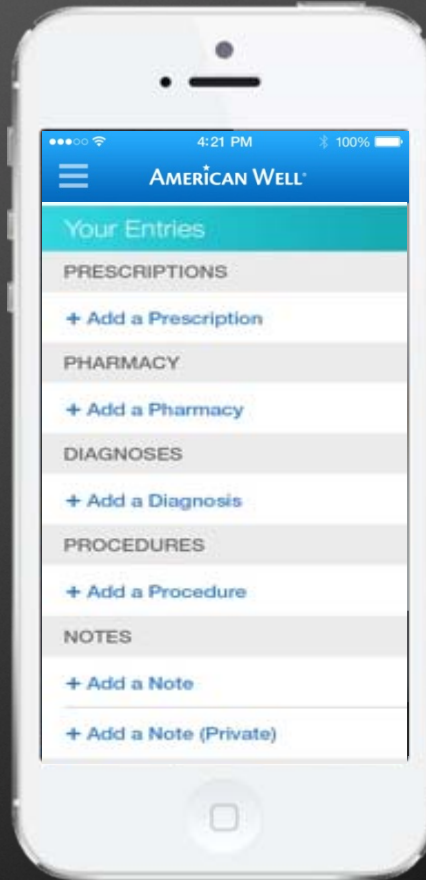


# The Mobile Practice

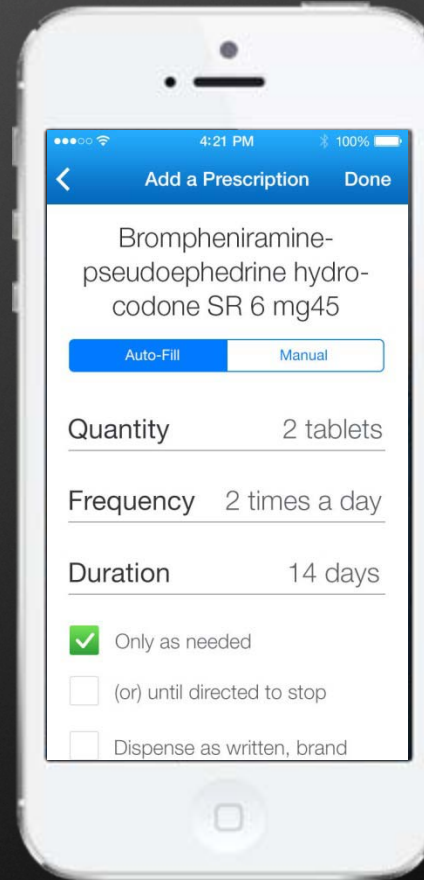
Video Visit



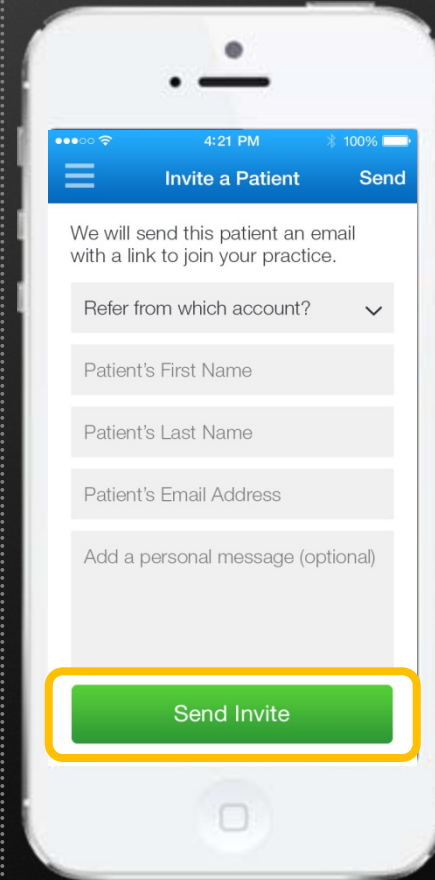
Encode/Annotate



e-Prescribe



Practice Invites





# Invite and Engage – One Click for Care

## Your Telehealth Appointment

Patient: **Katherine Smith**  
Provider: **Maria Lopez**  
When: **Friday, June 17, 2013 at 4:30 PM EST**  
Cost: **\$15.00**

A note from Maria Lopez: Hi Kate, this is a follow-up to your office visit.  
[Confirm this appointment](#) | [Cancel this appointment](#)

## Before Your Appointment

### Mobile Users

Download the free app. No need to enroll; we'll do that when you start your visit.



### Desktop Users

Make sure your webcam and microphone are working properly.



## When It's Time for Your Appointment

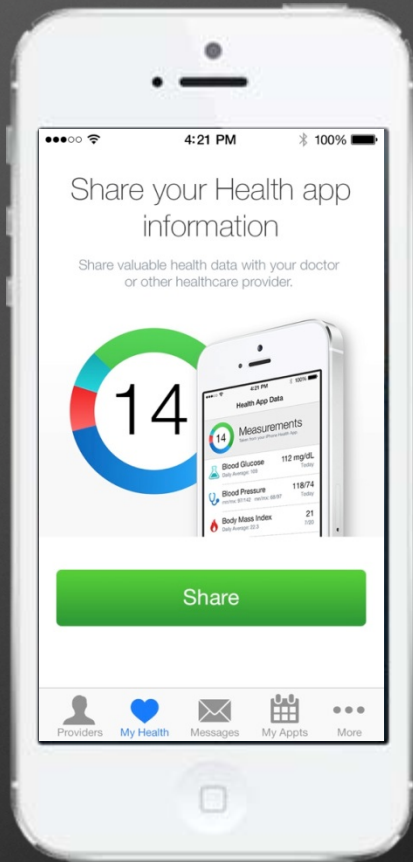
Just click the button below. You'll be asked to complete a few brief questions, and the provider will be notified of your arrival.



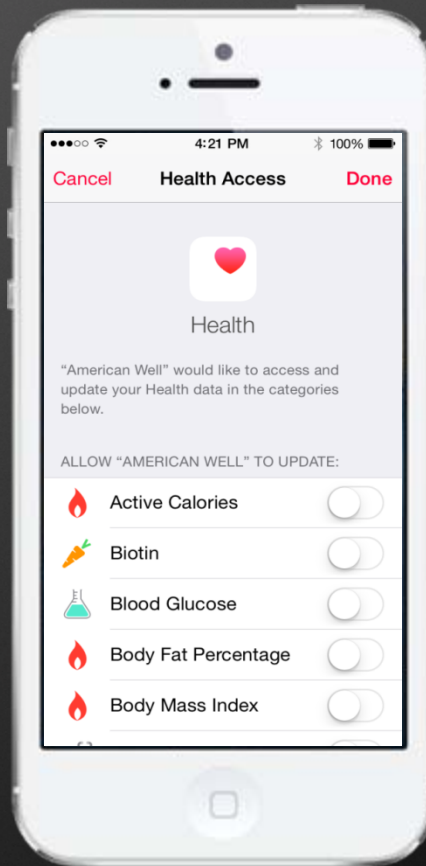
Questions? Call FirstCare Medical at (888) 555-1212. For technical assistance, call (888) 555-1212.



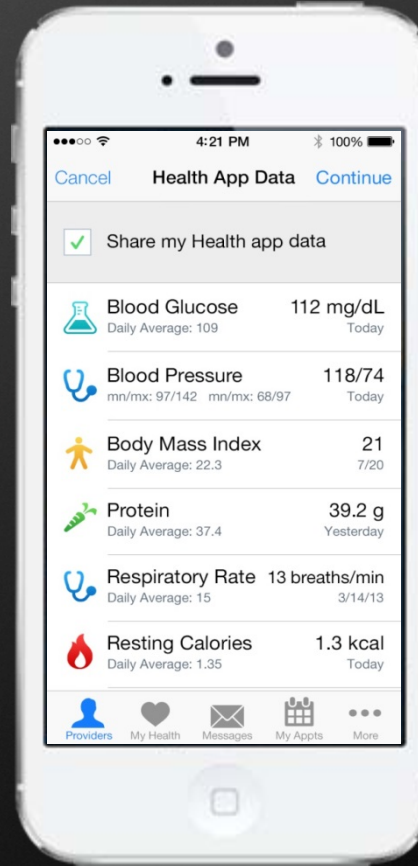
My Health



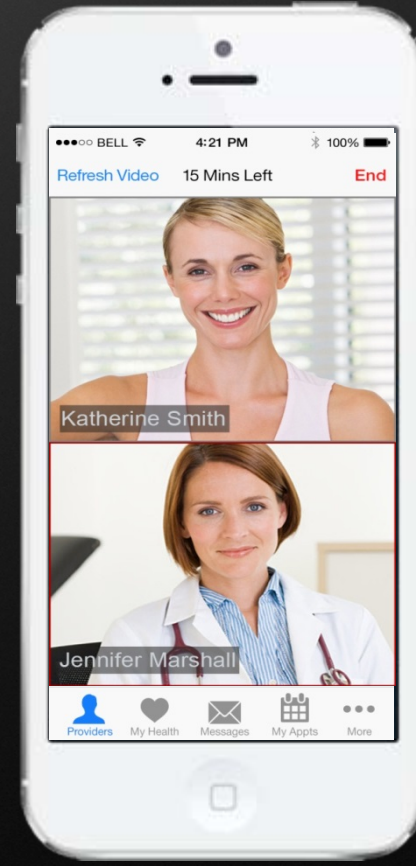
Pairing



Sharing



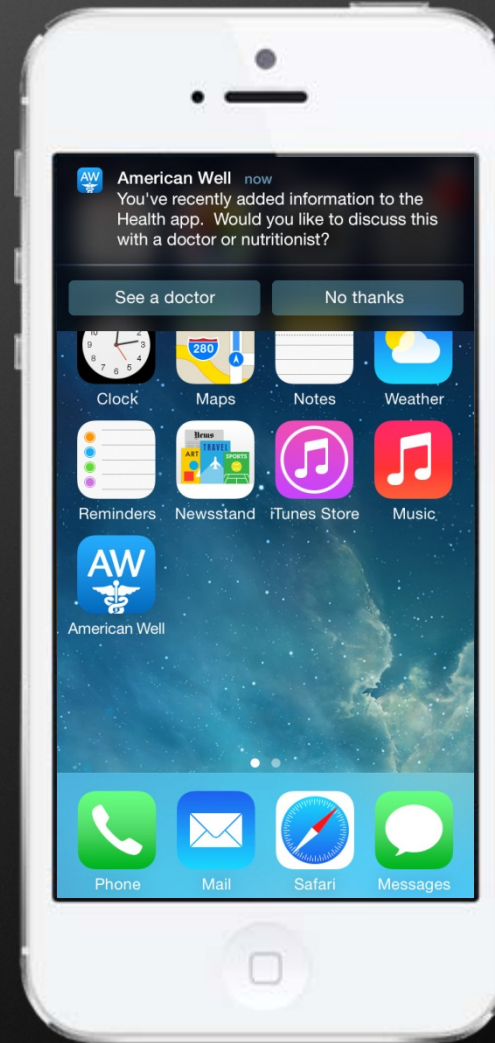
Caring



DEFAULT



EXPANDED





“... With apps such as **American Well**, users can securely share data such as blood pressure, weight or activity directly with physicians... We believe we’re just at the beginning of amazing new health and wellness solutions for our customers.”

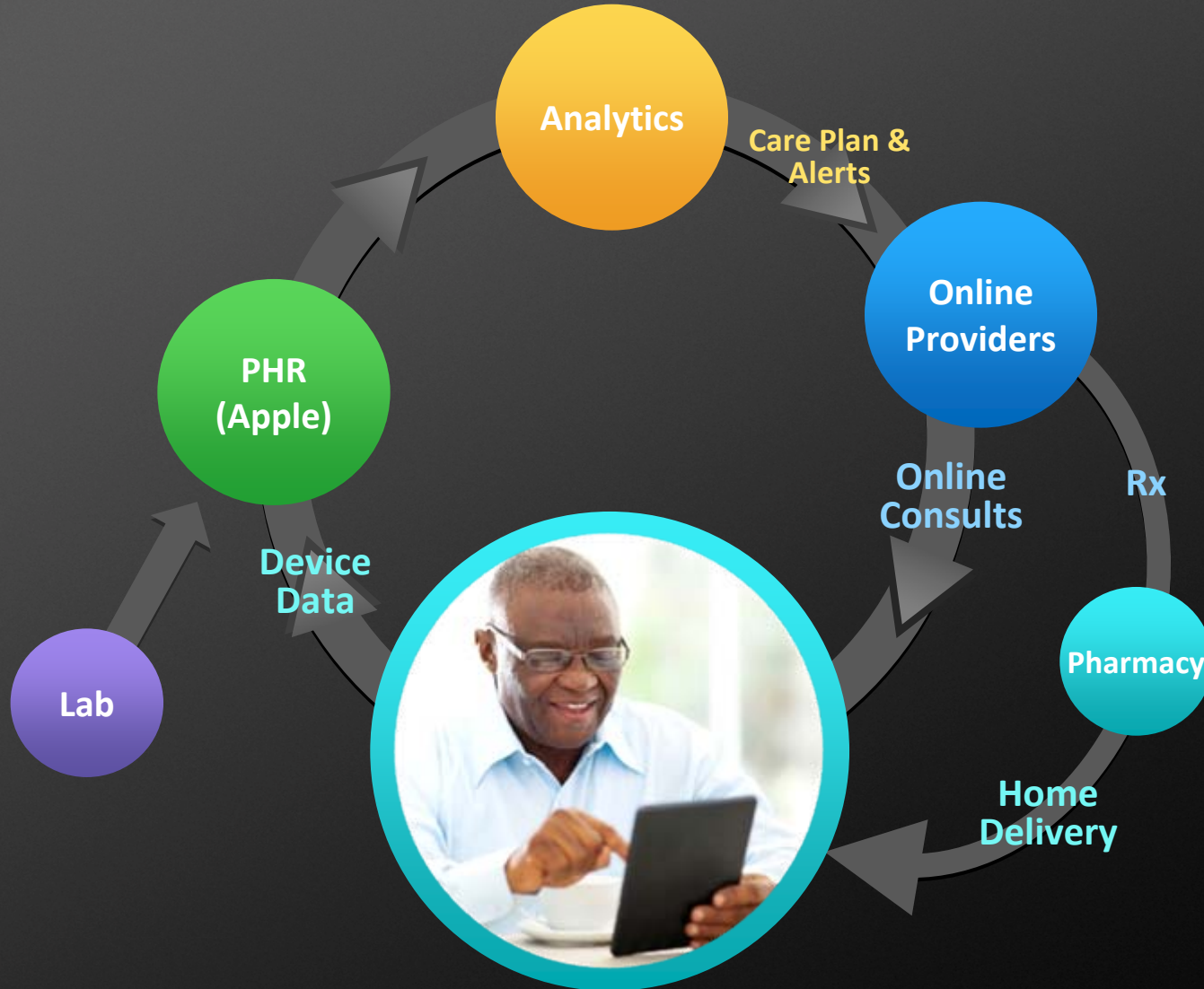
**Tim Cook, Apple CEO**



**Apple Quarterly Investor Call**  
February 2015



# Bringing Chronic Care Home





NURSE

PCP

SPECIALIST

PSYCHOLOGIST

NUTRITIONIST



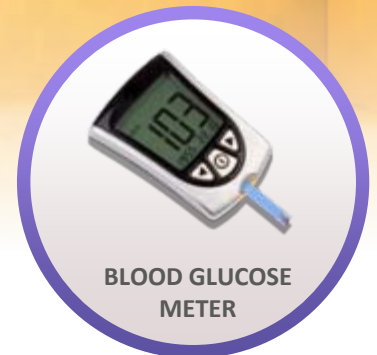
PEAK FLOW



SCALE



BLOOD PRESSURE  
CUFF



BLOOD GLUCOSE  
METER

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# American Well

Ido Schoenberg, MD  
Chairman & CEO



## First Telehealth Visit

Dr. Charles Gosse, 1874

Barrow Creek, Northern Territory, Australia

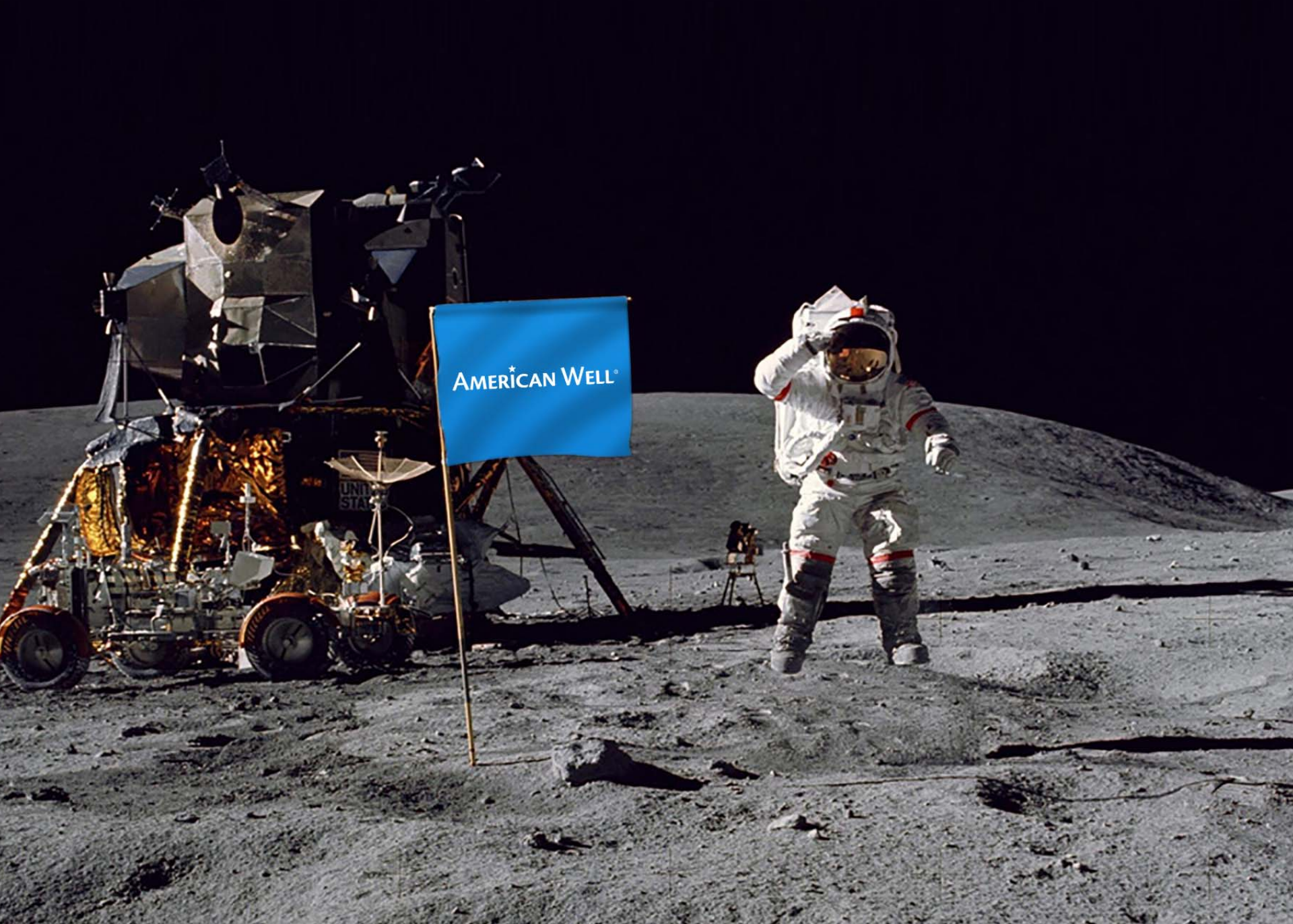




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Our mission is to provide the most ubiquitous and effective telehealth service in the US and eventually the world.

American Well, 2015



AMERICAN WELL®



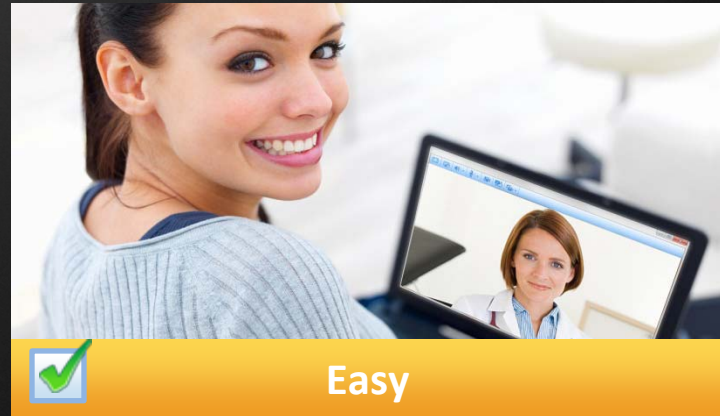
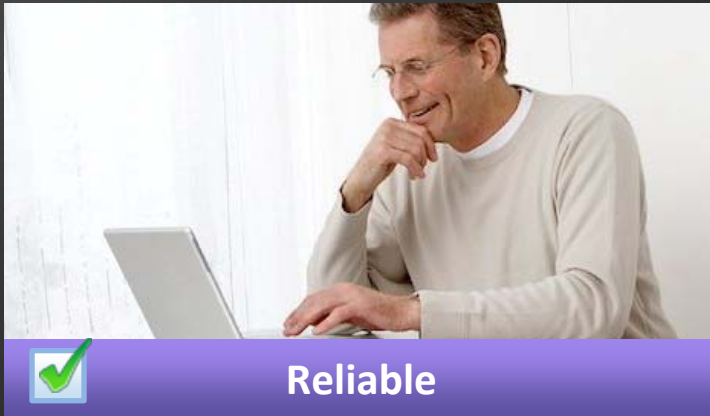
It was a long walk...





# In 2013, Key Barriers to Telehealth Fell

Until...





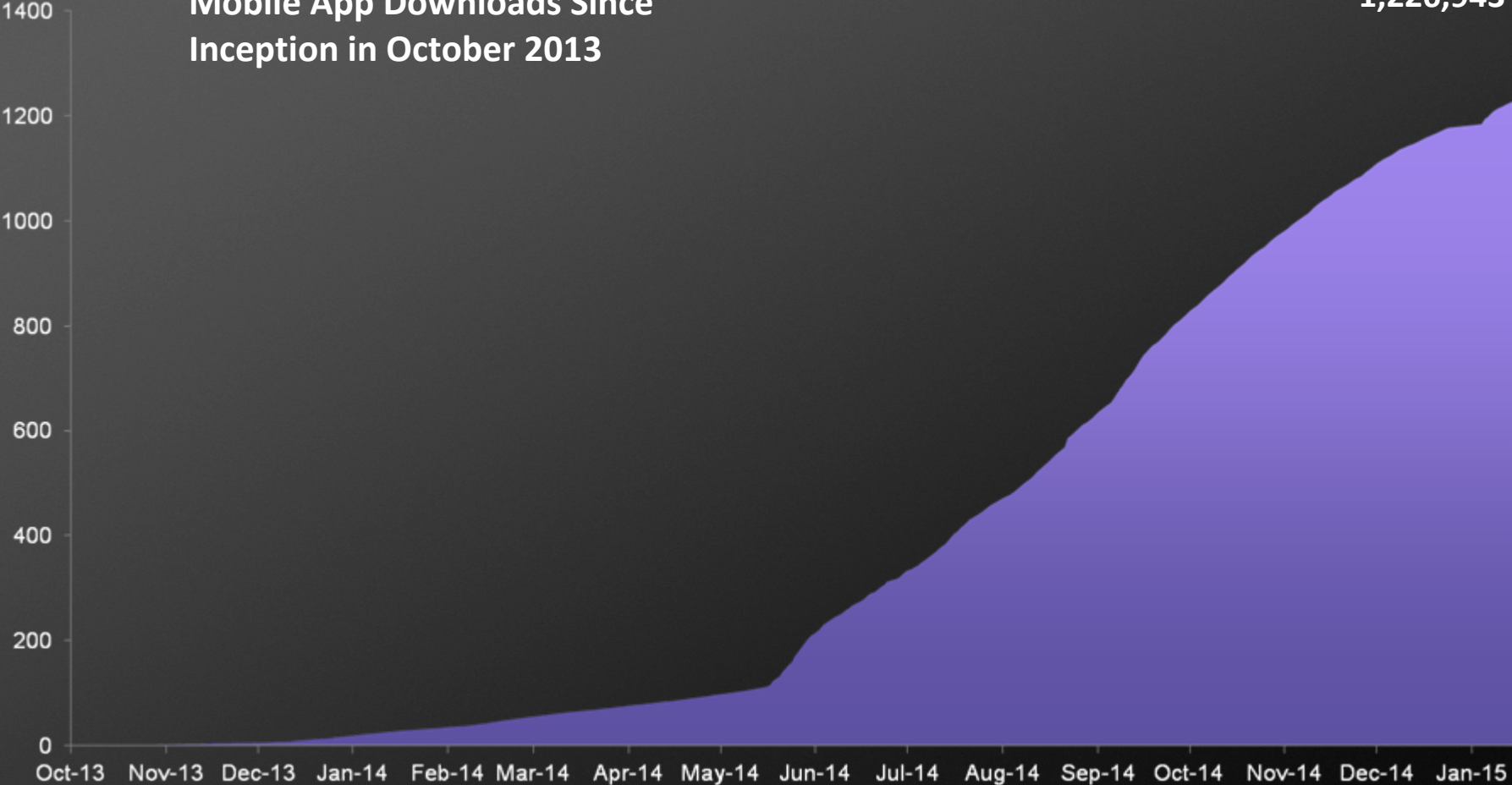
Eureka!



# Mobile Apps Are Driving Consumer Acceleration

Mobile App Downloads Since Inception in October 2013

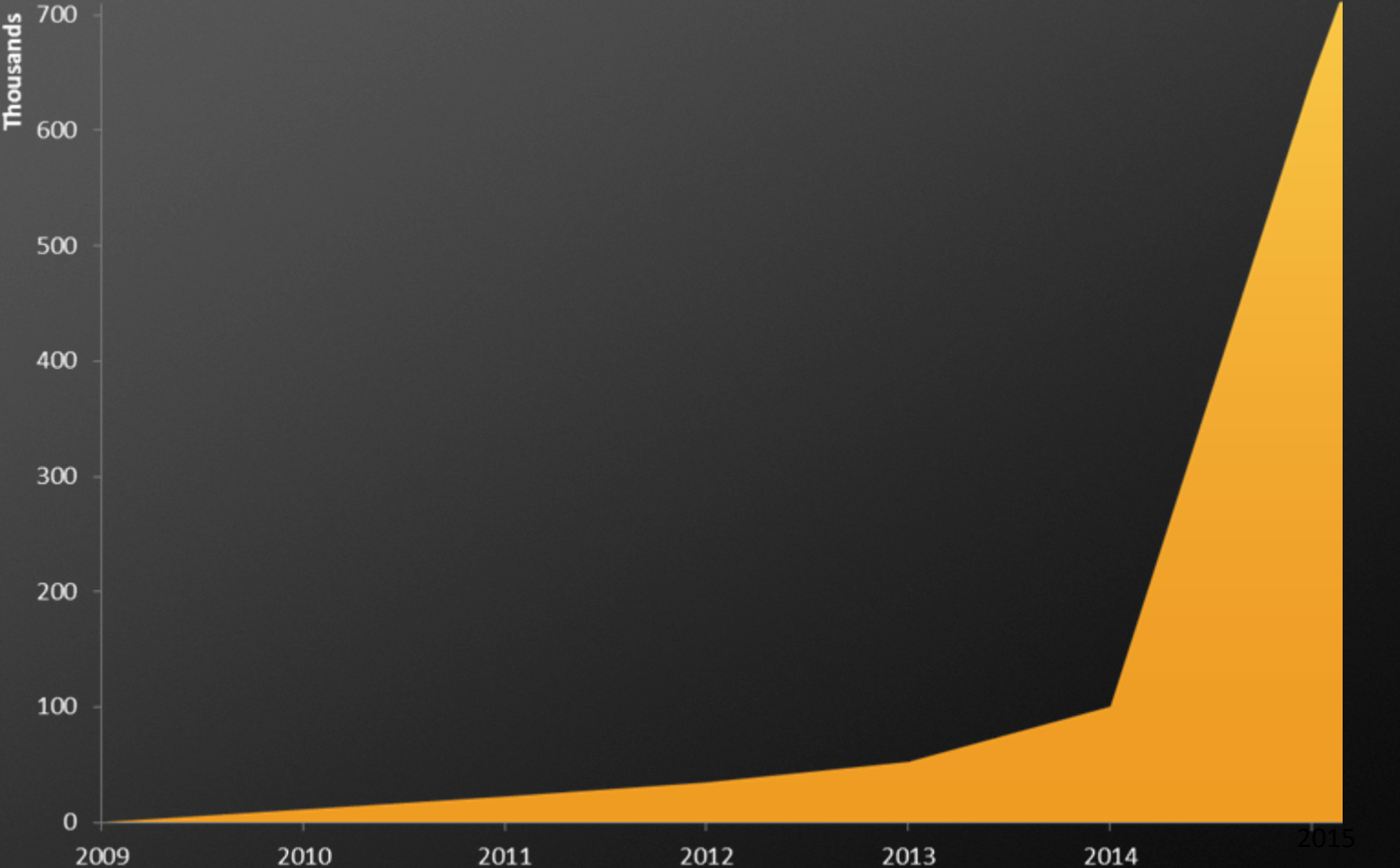
1,226,943





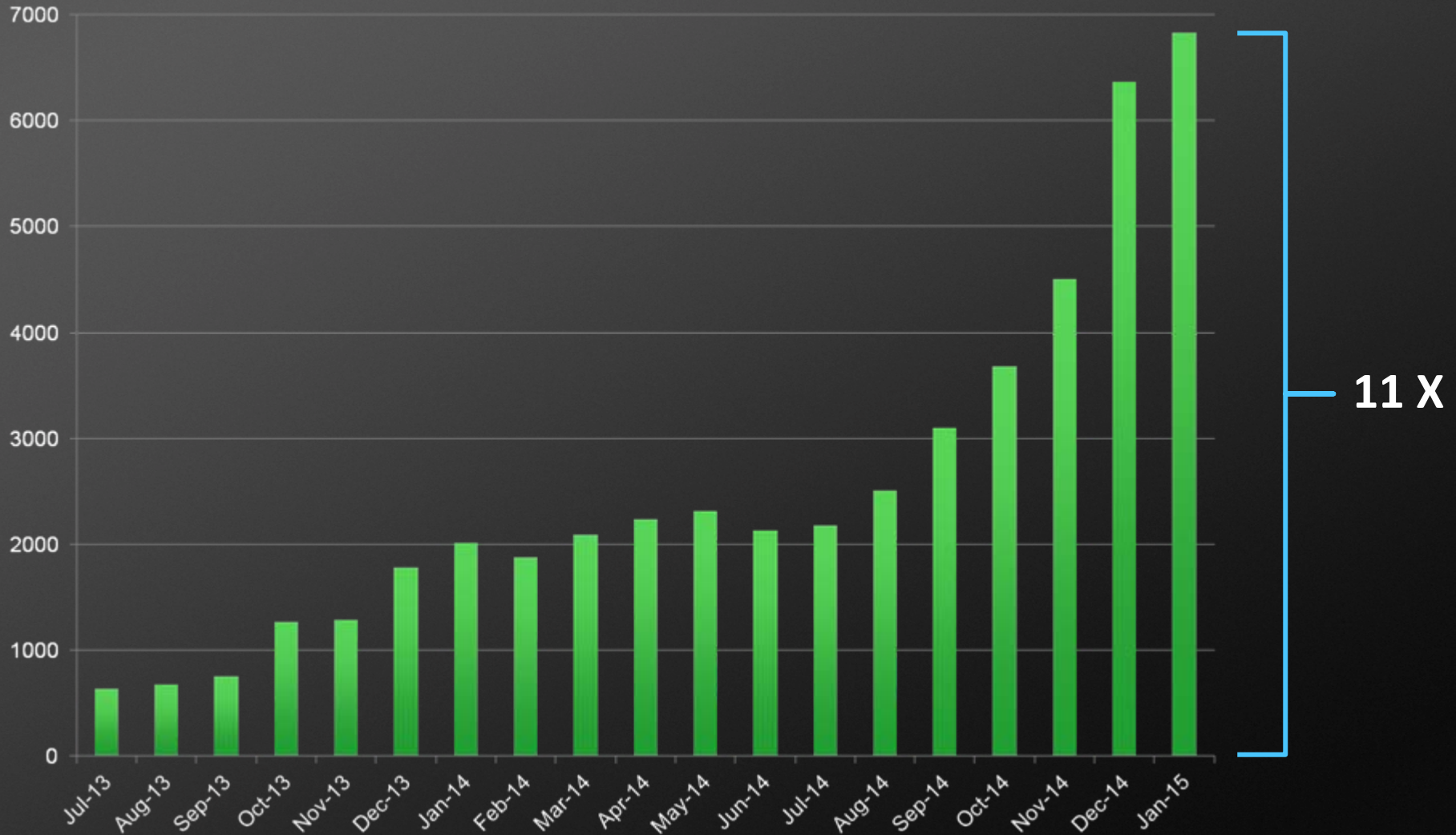
# Consumer Sign ups Accelerating into 2015

## Consumer Enrollments

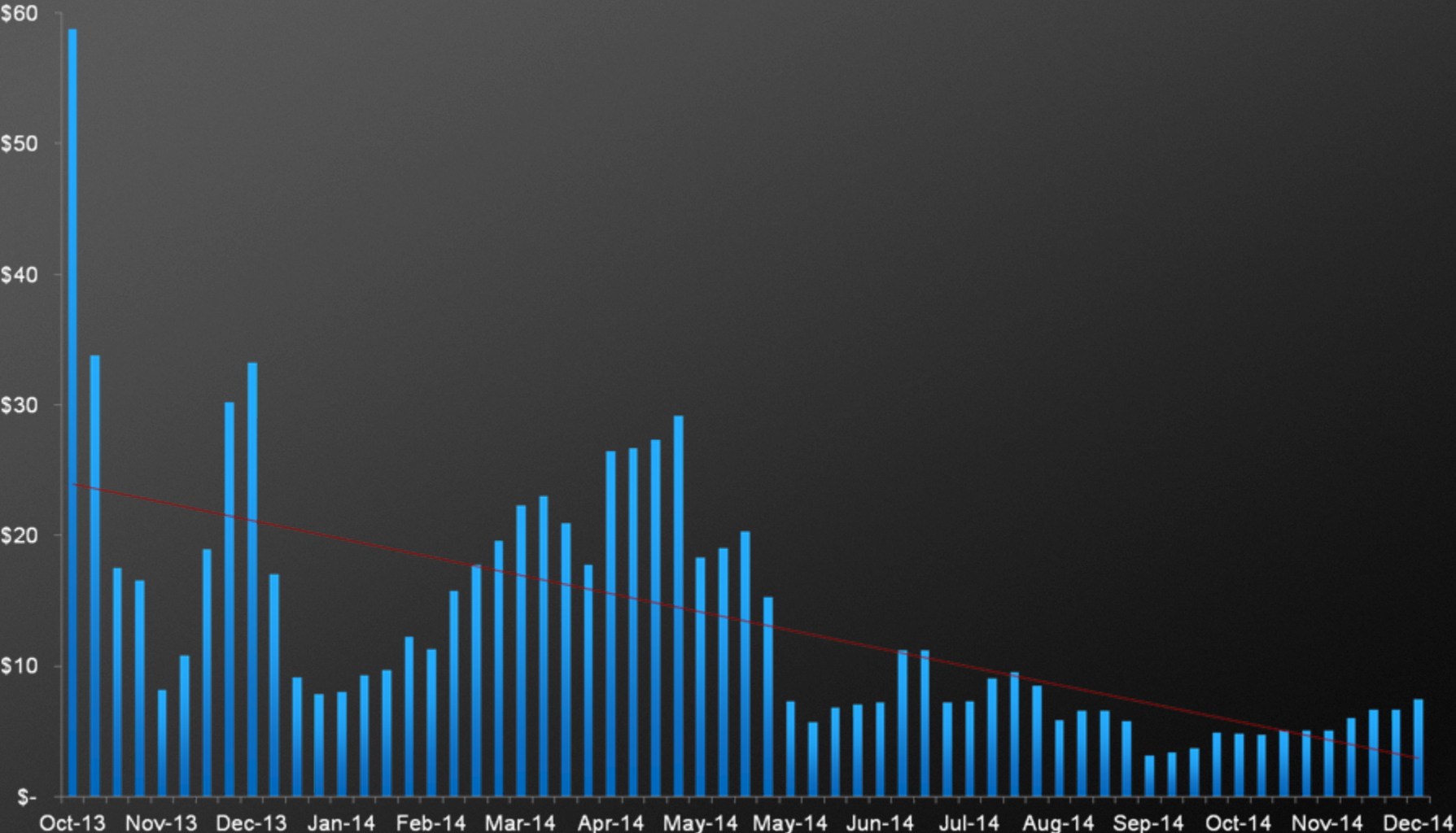


As of 2/14/15

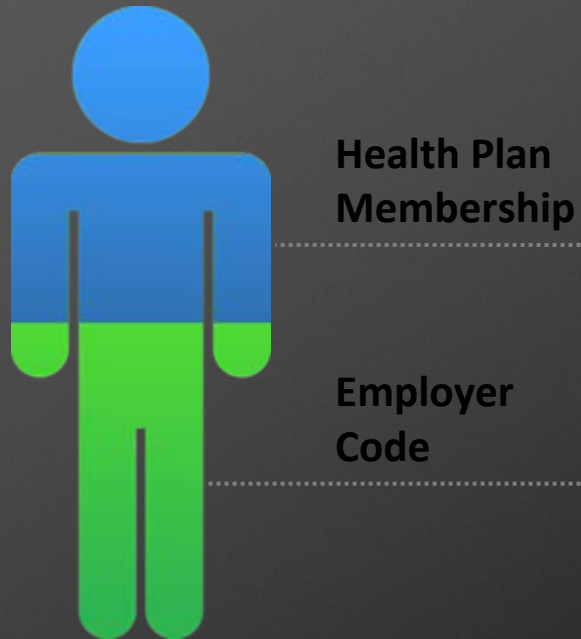
# Monthly Visits 11x Since July 2013



# Cost Per Enrollment by Week





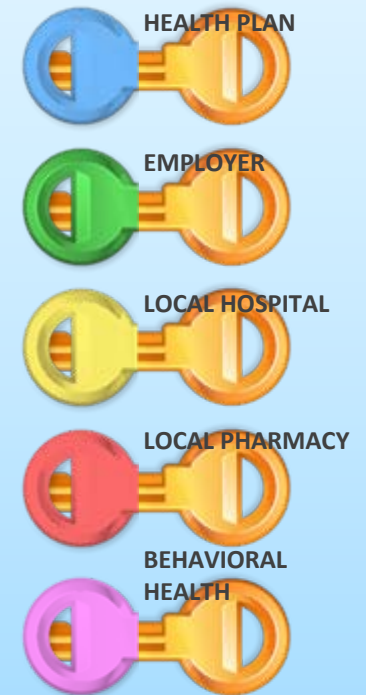


- User identity is defined by health plan subscriber ID and employer code
- Service is linked to identity

## Consumer Identity



## Service Experience



- User Identity is who they are (username and password)
- Service is linked to keys

1

# Medical

ONLINE SERVICES

Welcome to our practice. We provide primary care services. Our practice is staffed by family doctors, internists and other physicians. New patients are welcome. We look forward to serving you and your family's health needs.

## Providers Available Now

Choose from these providers to start a visit now.

**Maria Lopez**  
Internist  
★★★★★  
[View Profile](#)

AVAILABLE NOW

**Vivek Patel**  
Family Physician  
★★★★★  
[View Profile](#)

AVAILABLE NOW

**John Alan**  
Family Physician  
★★★★★  
[View Profile](#)

AVAILABLE NOW

**Angela Williamson**  
Internist  
★★★★★  
[View Profile](#)

WAITING ROOM

**Jonathan Meyers**  
Internist  
★★★★★  
[View Profile](#)

**Jennifer Marshall**  
Internist  
★★★★★  
[View Profile](#)

## More Groups

2

3

4

5

+ Add a Group Key



Welcome to our practice. We provide primary care services. Our practice is staffed by family doctors, internists and other physicians. New patients are welcome. We look forward to serving you and your family's health needs.

### Online Providers

Choose from these providers to start a visit now.

 **Maria Lopez**  
Internist  
★★★★★  
[View Profile](#)  
START VISIT

 **Vivek Patel**  
Family Physician  
★★★★★  
[View Profile](#)  
START VISIT

 **John Alan**  
Family Physician  
★★★★★  
[View Profile](#)  
START VISIT

 **Angela Williamson**  
Internist  
★★★★★  
[View Profile](#)  
WAITING ROOM

 **Jonathan Meyers**  
Internist  
★★★★★  
[View Profile](#)  
WAITING ROOM

 **Jennifer Marshall**  
Internist  
★★★★★  
[View Profile](#)  
WAITING ROOM

[Load More Providers](#)

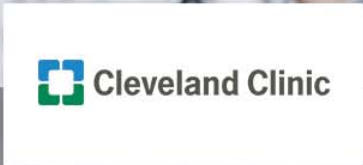
### My Groups



+ Add a Group Key

Who The Patient Is  
Employers, Product Lines, Geographic Demographics







Welcome to our practice. We provide primary care services. Our practice is staffed by family doctors, internists and other physicians. New patients are welcome. We look forward to serving you and your family's health needs.

## Online Providers

Choose from these providers to start a visit now.

  
**Maria Lopez**  
Internist  
★★★★★  
[View Profile](#)  
Cleveland Clinic **START VISIT**

  
**Vivek Patel**  
Family Physician  
★★★★★  
[View Profile](#)  
Cleveland Clinic **START VISIT**

  
**John Alan**  
Family Physician  
★★★★★  
[View Profile](#)  
Cleveland Clinic **START VISIT**

  
**Angela Williamson**  
Internist  
★★★★★  
[View Profile](#)  
Cleveland Clinic **WAITING ROOM**

  
**Jonathan Meyers**  
Internist  
★★★★★  
[View Profile](#)

  
**Jennifer Marshall**  
Internist  
★★★★★  
[View Profile](#)

## My Groups ?



+ Add a Group Key

Who The  
Provider Is  
Health Systems,  
Practices,  
Individual Docs



## Online Providers

Choose from these providers to start a visit now.

**John Clemens**  
Psychiatrist  
★★★★★

START VISIT >

**Jane Williams**  
Social Worker  
★★★★★

START VISIT >

**Yolanda Bane**  
Counselor  
★★★★★

START VISIT >

**Derick Parker**  
Psychiatrist  
★★★★★

WAITING ROOM >

**Greg Chesterfield**  
Social Worker  
★★★★★

**Lynda Morris**  
Counselor  
★★★★★

## Services



+ Add a Service Key

## What The Service Is

Diabetes,  
Behavioral  
Health, Maternity

A-La-Carte  
Per Market Demand



BEHAVIORAL  
HEALTH

Welcome to our practice. We provide primary care services. Our practice is staffed by family doctors, internists and other physicians. New patients are welcome. We look forward to serving you and your family's health needs.

## Online Providers

Choose from these providers to start a visit now.

 **John Clemens**  
Psychiatrist  
★★★★★  
START VISIT >

 **Jane Williams**  
Social Worker  
★★★★★  
START VISIT >

 **Yolanda Bane**  
Counselor  
★★★★★  
START VISIT >

 **Derick Parker**  
Psychiatrist  
★★★★★  
WAITING ROOM >

 **Greg Chesterfield**  
Social Worker  
★★★★★

 **Lynda Morris**  
Counselor  
★★★★★

## Services



+ Add a Service Key



A person wearing a grey hoodie, a grey baseball cap, blue pants, and brown gloves is sitting on cardboard boxes. They are holding a sign made of cardboard that has the word "HELP" written on it in blue marker. To their right is a large black plastic bag. The background is a plain white wall.

We Care



Anthem leads, who follows?