

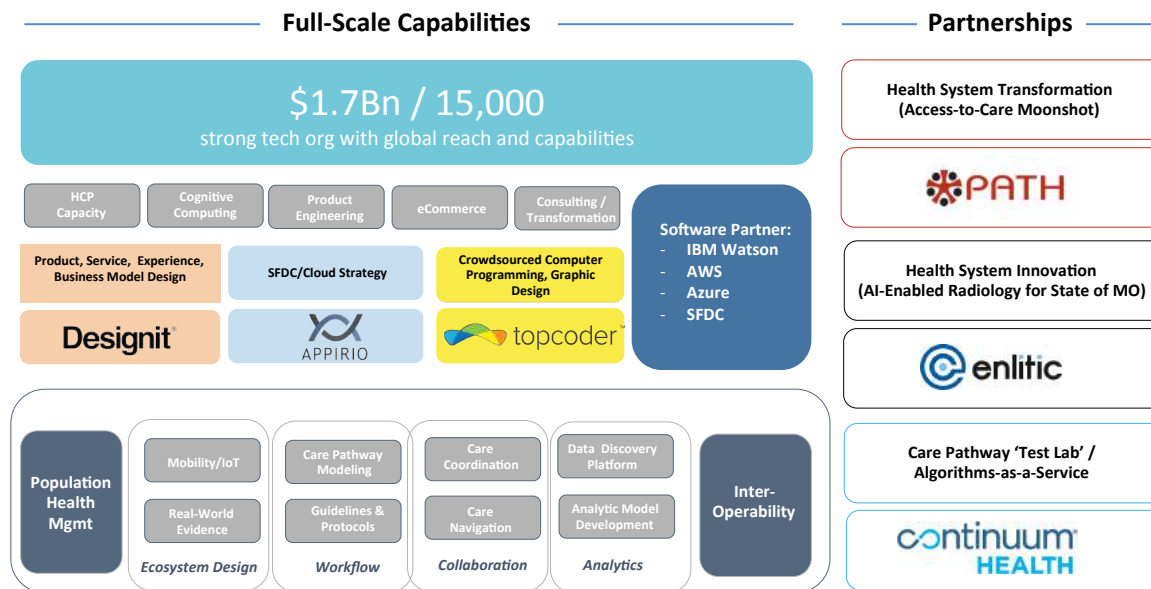


The Next Healthcare is About Competing on Outcomes

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wipro health

ORGANIZED TO DELIVER END-TO-END SOLUTIONS



a complete vision + ability to execute at scale

CLIENTS ACROSS HEALTH SYSTEM NAVIGATING A TRANSITION SPACE

Retail
Media
FMCG
Transportation
Telecommunications
Consumer electronics
Healthcare
Technology
Financial Services

Device/Pharma



Provider



Payer



Emerging Markets



story of a high-velocity market shift

THE FUTURE IS ALREADY HERE, IT'S JUST NOT EVENLY DISTRIBUTED

Amazon, Berkshire Hathaway and JPMorgan Team Up to Disrupt Health Care

By NICK WINGFIELD and KATIE THOMAS JAN. 30, 2018



Employees at an Amazon warehouse in Florence, N.J. The company will join forces with Berkshire Hathaway and JPMorgan Chase to try to improve health care. Bryan Anselm for The New York Times

RELATED COVERAGE



How Big Tech Is Going After Your Health Care
DEC. 26, 2017



CVS to Buy Aetna for \$69 Billion in a Deal That May Reshape the Health Industry
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NOV. 26, 2017

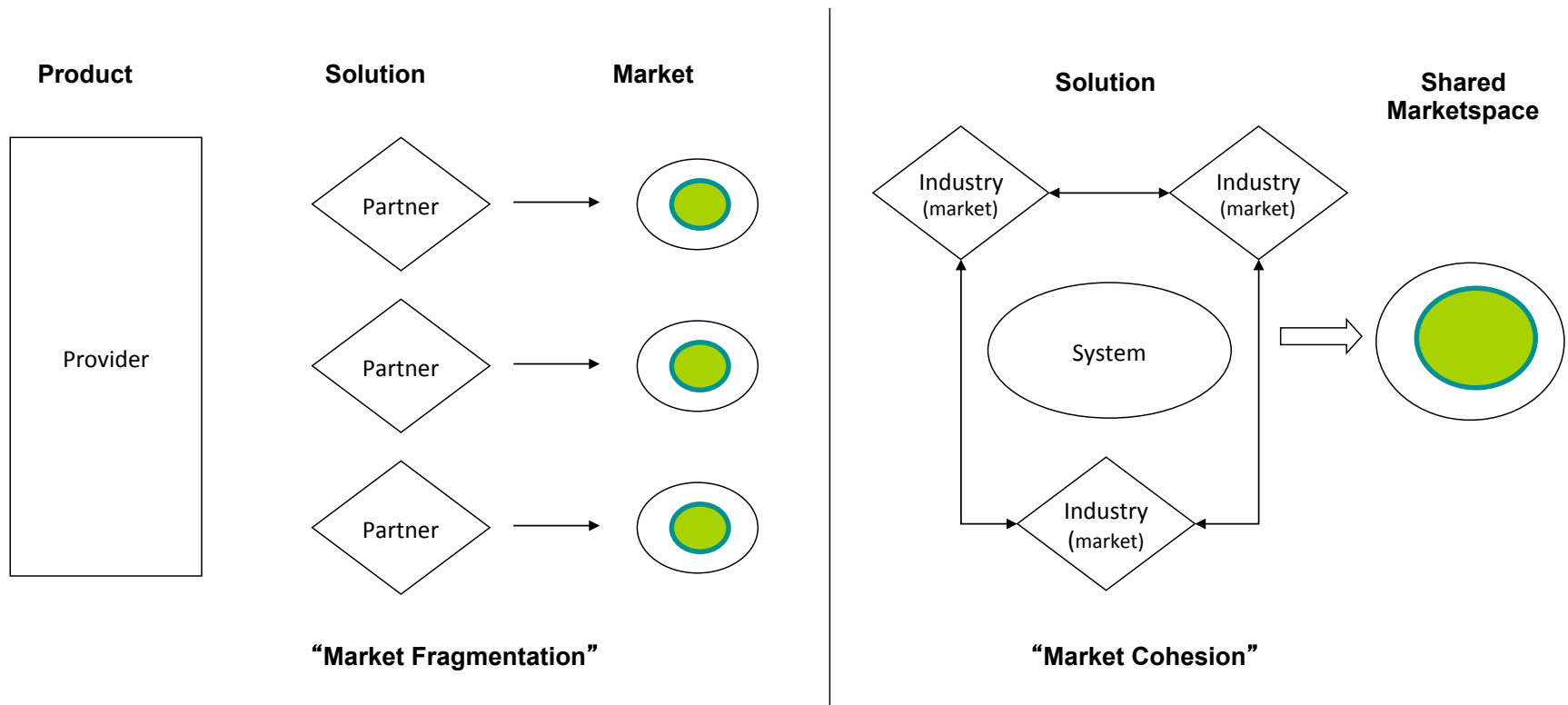
RECENT COMMENTS

Gina Ryan 49 minutes ago

Hope these big three can come up with a template that could be adapted for universal health care. Maybe that would be a good alternative to...

an 'amazon strategy'

REMOVES FRICTION, ENABLES LINKAGES, ORGANIZES ON THE CUSTOMER



healthcare is a 'nested market'

DISSOLVING BOUNDARIES, SOLVING FOR FRAGMENTATION



+



new payment models

PERFORMANCE-BASED GUARANTEES, OUTCOMES-BASED CONTRACTS

Provider Payment (Income) Based on Value + Pharma/Medical Device Access Based on Outcomes

\$354B² | \$605B³

¹Aetna's "Vision 2020" Strategy seeks to ensure 75 percent of Aetna's contracts are in value-based care models within the next four years

²Health Care Payment Learning & Action Network. *Measuring Progress: Adoption of Alternative Payment Models in Commercial, Medicaid, Medicare Advantage, and Fee-for-Service Medicare Programs*. October 30, 2017.

³Statista. The United States holds over 45 percent of the global pharmaceutical market. In 2016, this share was valued around 446 billion U.S. dollars The medical device market in the United States is valued at \$155 billion.

"Coding: The Under-coding Epidemic" By Bill Dacey, Physicians Practice, April, 1, 2006, <http://www.physicianspractice.com/articles/coding-under-coding-epidemic>

new systems of engagement

SOLVING FOR THE QUADRUPLE AIM (VS. THE TRIPLE AIM)

$$\text{Value} = \frac{\text{Set of Health Outcomes That Matter to Patients}}{\text{Costs of Delivering Outcomes}}$$

Provider Strategy

Consumer Strategy

Payer Strategy

The diagram illustrates the equation for Value. The numerator is 'Set of Health Outcomes That Matter to Patients', with 'Set' in pink. The denominator is 'Costs of Delivering Outcomes'. Brackets above the numerator indicate that 'Provider Strategy' covers the first part and 'Consumer Strategy' covers the second part. A bracket below the denominator indicates that 'Payer Strategy' covers the entire denominator.

new value frameworks

A 'DESIGN POINT' TO ORGANIZE MARKET, TECHNOLOGY, DATA STRATEGY



ABOUT STANDARD SETS MEASURE TECHHUB EVENTS & MEDIA SUPPORT US LOGIN

COMPLETED CONDITIONS

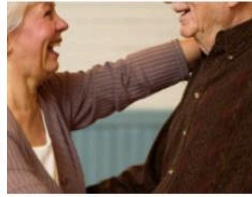
All 23	Cardiovascular 4	Congenital Anomalies 2	Diabetes, Blood and Endocrine 1	Digestive 1	Malignant Neoplasms 5	Maternal and Neonatal 1
Mental and Behavioral Disorders 1	Musculoskeletal 2	Neurological 2	Primary/Preventative Care 1	Sense Organ 2	Urogenital 1	



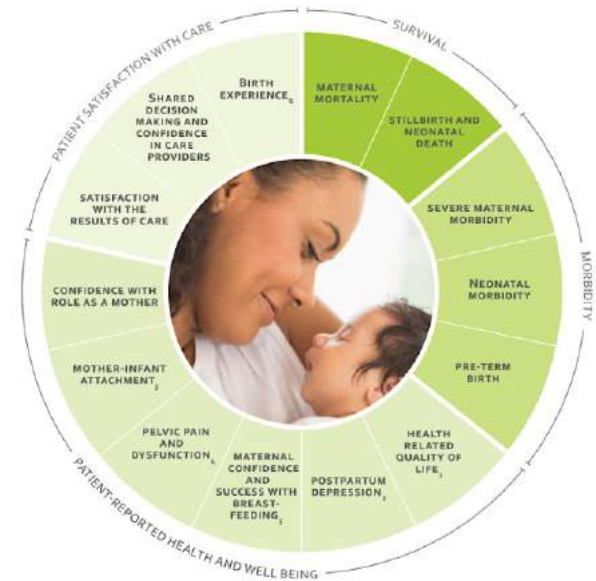
Colorectal Cancer
Malignant Neoplasms



Chronic Kidney Disease
Diabetes, blood and endocrine



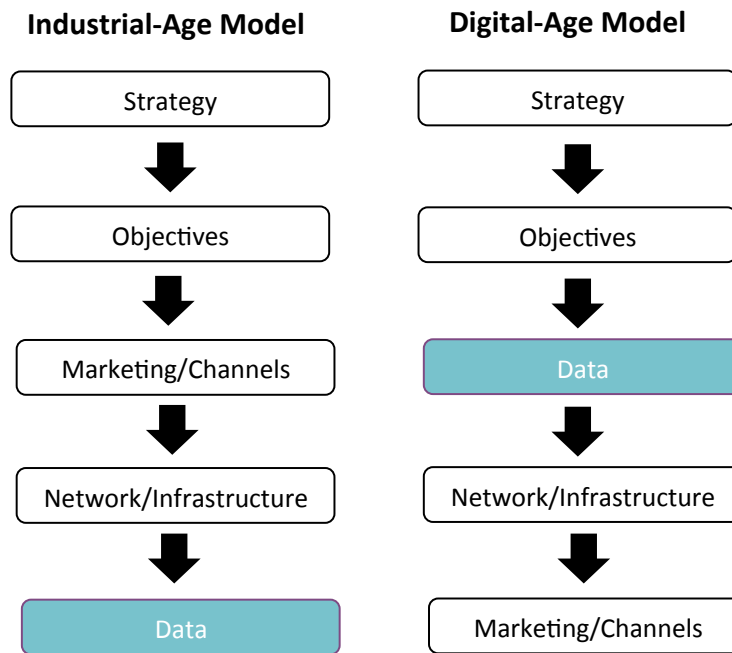
Advanced Prostate Cancer
Malignant Neoplasms



Pregnancy and Childbirth

data is the new dollar

DIGGING FOR DATA REQUIRES A STRATEGY



'smart dust'

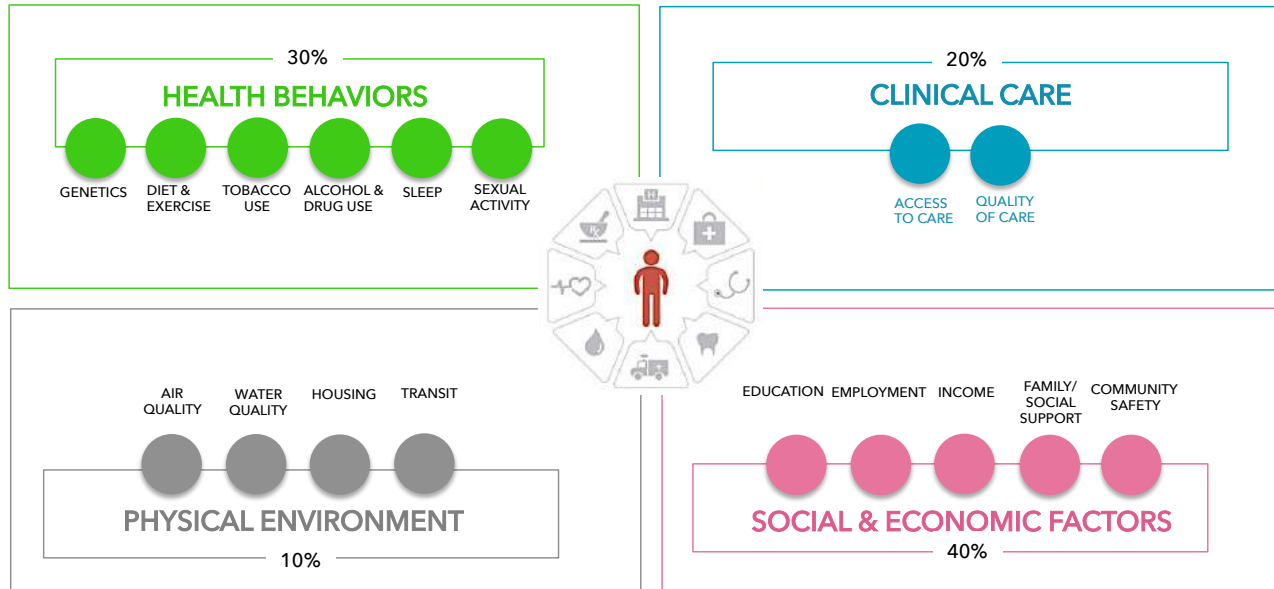
SENSOR PROLIFERATION EXPLODING: DESIGN FOR ANALYTICS



true drivers of better health outcomes

A PATIENT-TO-CONSUMER LOOP OVER AN EXTENDED PERIOD OF TIME

Need to Go Beyond the Clinical Setting



Source: Kleiner Perkins 2016

retail pharmacy is new front door

RETAIL HEALTH CLINICS ARE PHYSICIAN EXTENDERS

	minute clinic <small>the medical clinic in CVS/pharmacy</small>		healthcare clinic <small>at select Walgreens</small>		The Little Clinic <small>Convenient Neighborhood Medical Care</small>		Walmart care clinic <small>quality healthcare at an everyday low price</small>		CLINIC <small>CARE PROVIDED BY SABER PHARMACEUTICALS</small>		RITE AID PHARMACY RediClinic		TOTAL BIG 6	
Sites / Market Share	901	50%	457	24%	140	8%	103	6%	80	4%	30	2%	1,711	93%
Health System Affiliation	47		6		4		46		2		3		108	

Note: Of the 600 million PCP visits in the United States each year, it is estimated that about 20 percent could be handled at retail clinics (National Ambulatory Medical Care Survey, 2009-2010)

“digitally-enabled” service design

LESS ABOUT SMARTPHONE, MORE ABOUT NEW ENVIRONMENTS



FOUNDED	2013	2017	2017	2012	2013	2015
FEE/SERVICE	\$75 On-demand primary care doctor/psychologist via video chat	AI-based digital urine analysis at home	\$300 for Introductory Kit	predictive diagnostic test for cognitive decline (\$99 test)	\$15/week 1:1 Nutrition Coach	“Home Delivery” of Phlebotomy
REGION	United States (except Arkansas)	National Health Service/ FDA	United States	Worldwide	Worldwide	120 cities
TARGET CUSTOMER	Consumers/ Employers	HCPs/ Consumers (MS and CKD)	Consumers	Families, Employers	Consumers	Physicians/ Nurses

risk throwing sexy tech at the problem

BUILD-IT-AND-THEY-WLL-COME VS. PROVE-IT-AND-THEY-WILL-USE-IT



OPEN ACCESS PEER-REVIEWED

RESEARCH ARTICLE

A Large-Scale Initiative Inviting Patients to Share Personal Fitness Tracker Data with Their Providers: Initial Results

Joshua M. Pevnick, Garth Fuller, Ray Duncan, Brennan M. R. Spiegel

Published: November 15, 2016 • <https://doi.org/10.1371/journal.pone.0165908>

Article	Authors	Metrics	Comments	Related Content
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Cedars-Sinai invited 80,000 patients to connect their wearables to the EHR; less than 500 did.

See: "Don't Let IBM's Blunders in Healthcare Blind You to the Huge Benefits of Technology" CNBC, September 7, 2017

a 'consumer-grade experience'

EXPECTATIONS OF AN AMAZON-LEVEL OF SERVICE, REGARDLESS OF INDUSTRY

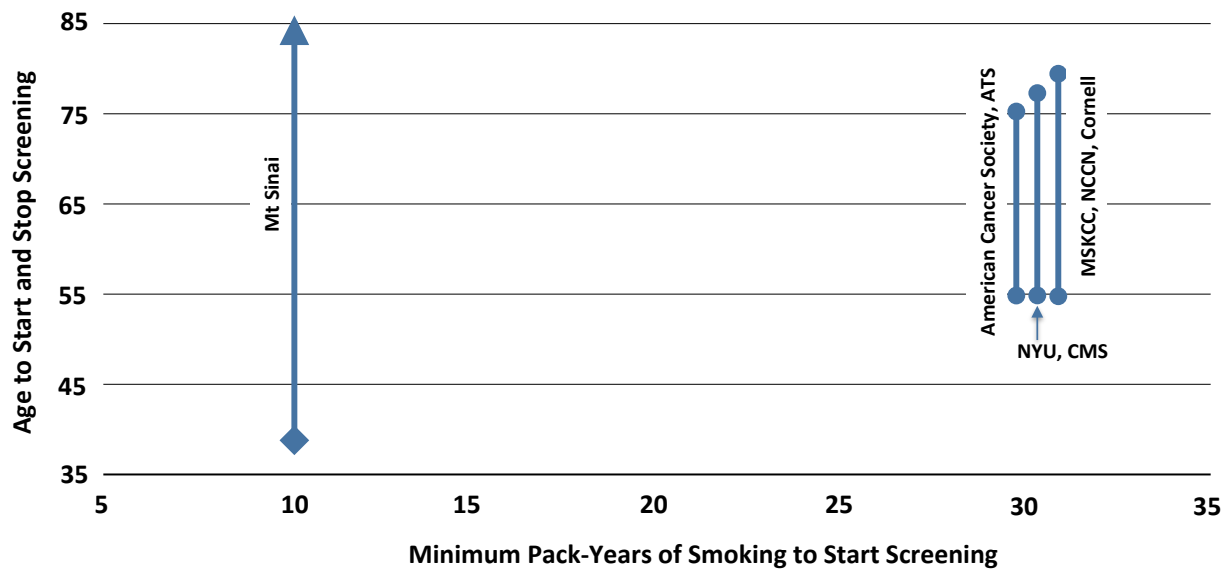


a new health standard (e.g., lung cancer)

CLOUD + AI HEALTH = DIAGNOSE BETTER, ENGAGE EFFICIENTLY, PERSONALIZE

Mount Sinai vs. others on whom to screen for lung cancer based on age and smoking history

(Ann Intern Med. 2012 Oct 16;157(8):571-3. When the average applies to no one: personalized decision making about potential benefits of lung cancer screening.)



embed with electronic health record

APPLE STEPS INTO EPIC SYSTEM'S ARENA WITH MEDICAL RECORDS APP

**Modern
Healthcare**

**“Apple is officially in the
EHR business. Now what?”**

By Rachel Z. Arndt | January 26, 2018

See: **“Novartis and Apple to Scale Up Clinical Trial Collaboration”**
pharmaforum, January 24, 2018

Pilot-itis

pilotitis [pahy-luht-ahy-tis] – *the inability to break out of pilot stage.*

The term, a coinage which has found widespread use the past few years because of the flood of digital pilots in healthcare, was first heard at the GSMA mHealth Summit in South Africa at the end of May 2012, when organizations and international development leaders spoke about how the difficulty in taking projects beyond the pilot stage was holding back mobile health in low- and middle-income countries.

The Next Billion, An Initiative of the William Davis Institute at the University of Michigan

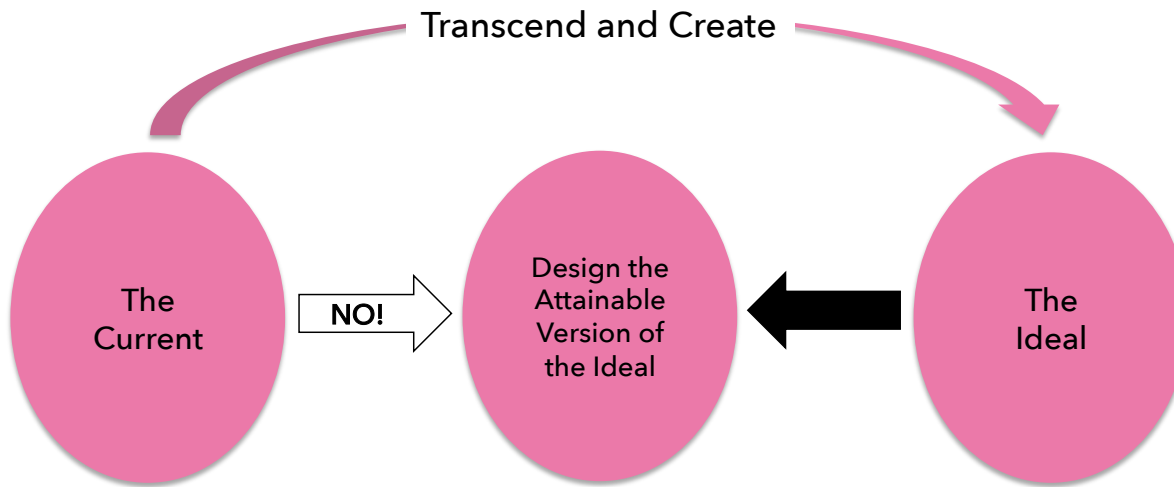
the how

'BIG DESIGN' METHODOLOGY FOR OUTCOMES-BASED INNOVATION



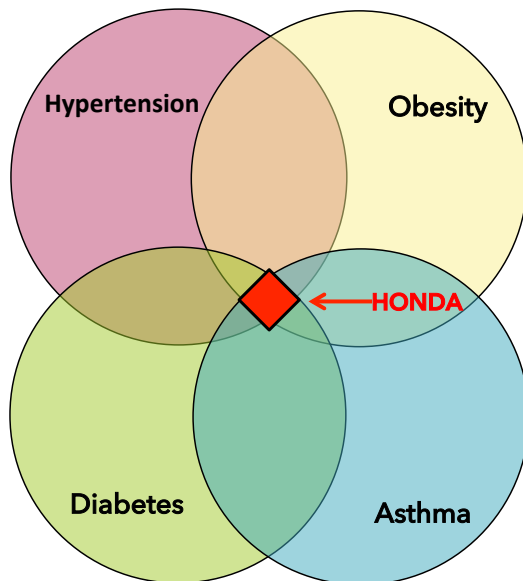
work back from ideal

AVOID THE PITFALL OF UNDER-CONCEPTUALIZATION



co-morbidity as market segmentation

HYPERTENSION + OBESITY + NON-COMPLIANT + DIABETES + ASTHMA



- **Patients with severe HONDA-related complications (CKD, atrial fibrillation, stroke, CHF) are among the sickest patients with chronic disorders; 50-57% of these patients have at least 5 additional comorbid conditions**
- **Patients with 4 or more chronic conditions** comprised 14% of Medicare/Medicaid beneficiaries but were **responsible for 47% of total spending**
- At a health system level, **direct and indirect costs of cardiovascular, metabolic and respiratory disorders were \$1.14 trillion (2010)**

Sources: Department of Health and Human Services
CMS Chronic Disease Dashboard; CDC; Decision Resources

assemble a 'zero story'

RE-IMAGINE A NEW SYSTEM OF HEALTH FROM THE GROUND UP

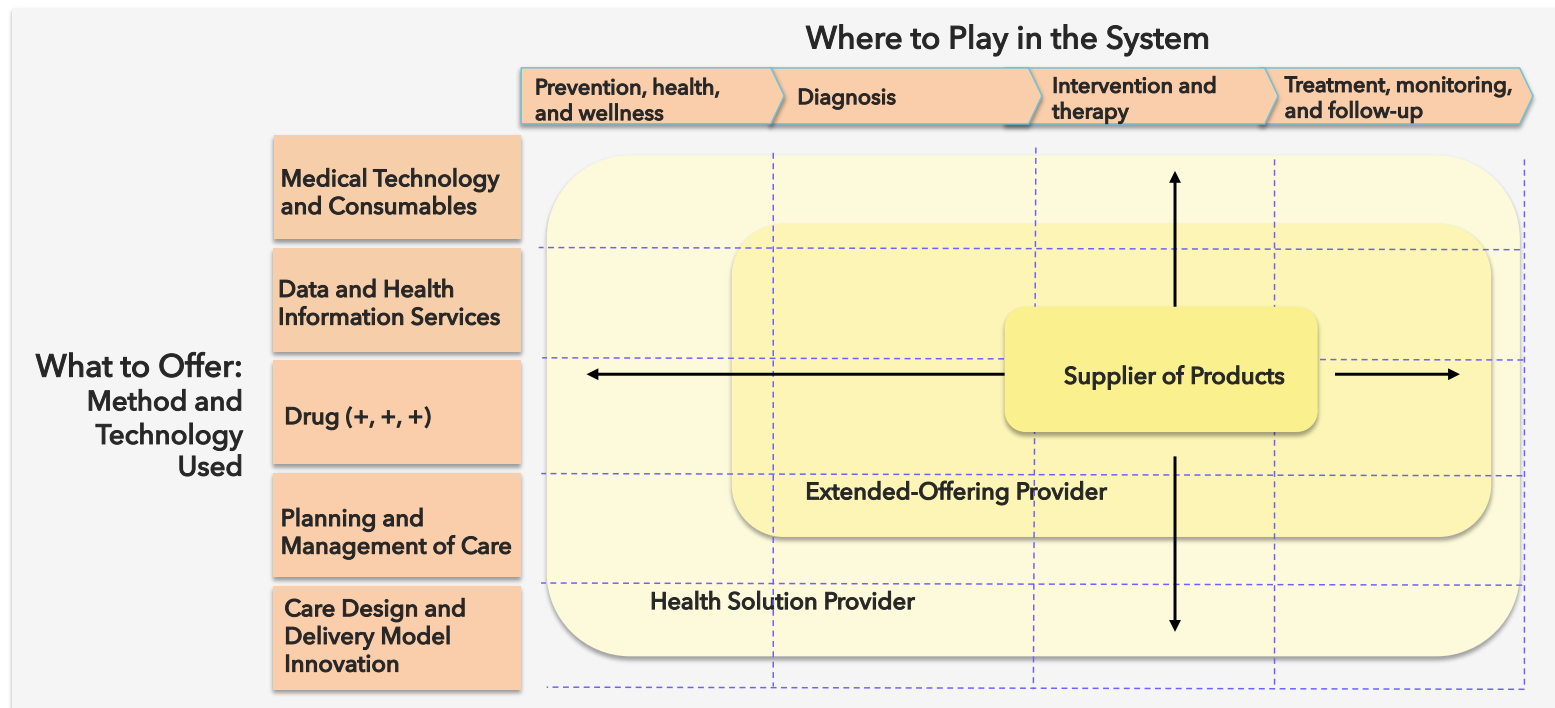
The N.D.N.A. Customer Experience Health System Design: Organizing Around the Patient Experience 22 January 2017

The dashboard contains the following sections:

- Top Navigation:** A series of tabs including 'Introduction', 'The N.D.N.A. Customer Experience', 'Health System Design: Organizing Around the Patient Experience', '22 January 2017', and 'Conclusion'.
- Section 1:** A grid of 12 small text boxes, each containing a brief description or key point.
- Section 2:** A line graph showing a fluctuating trend with a red line and yellow markers.
- Section 3:** A row of 12 small images, including a person, a clock, a computer screen, and various medical or healthcare-related scenes.
- Section 4:** A large text block with several bullet points, likely detailing key findings or recommendations.
- Section 5:** A grid of 12 larger text boxes, each containing more detailed information or data points.
- Section 6:** A final text block with bullet points, possibly a summary or conclusion.

determine where to play in the system

SUSTAINABLE ADVANTAGE FROM HARD-TO-DUPLICATE SERVICES



find a 'design point'

AN ORGANIZING IDEA TO INVENT A BETTER EXPERIENCE

How can we
Design/Create/Improve

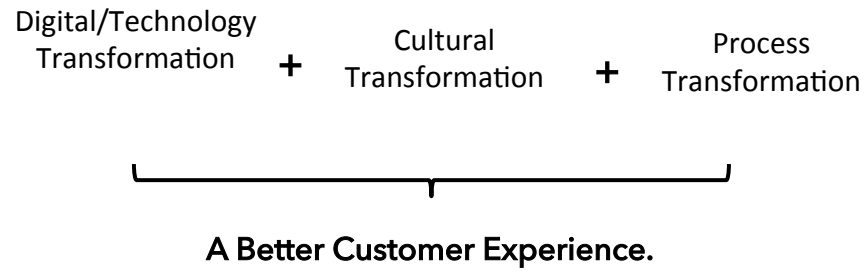
_____ (what)

FOR _____ (who)

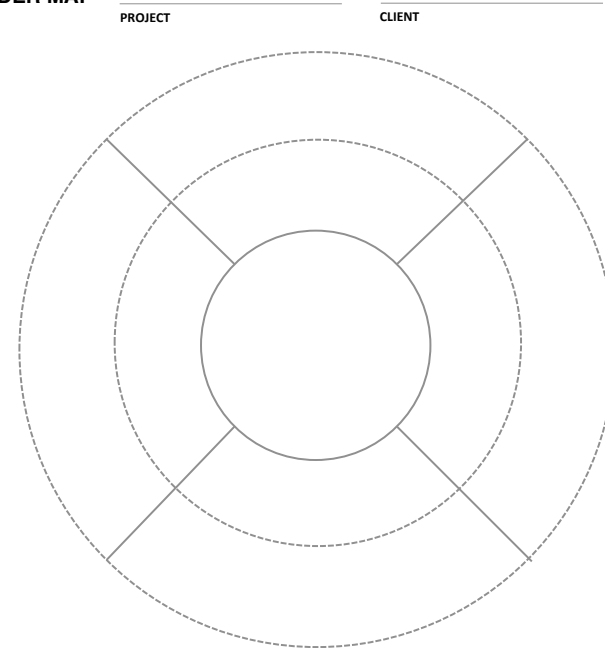
TO _____ (aim)

create stakeholder map(s)

IDENTIFYING, CLASSIFYING, LINKING THE PEOPLE WITH INFLUENCE



STAKEHOLDER MAP



...iterate with market engagement

RAPID PROTOTYPE SOLVES THE CHICKEN-AND-EGG PROBLEM



Collaboration Model

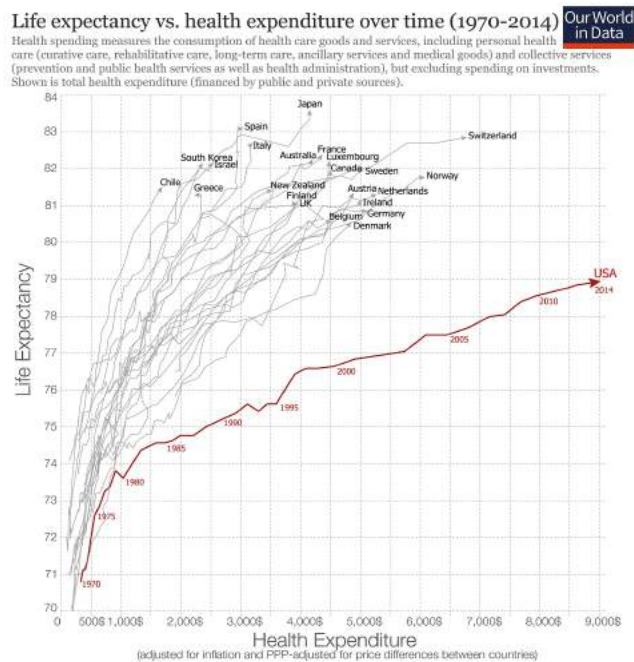
Experience Design Research

Prototype

Clarity, Focus

a broad re-imagining of \$3.3 trillion

“SUCCESS IS GOING TO REQUIRE A BEGINNER’S MIND”



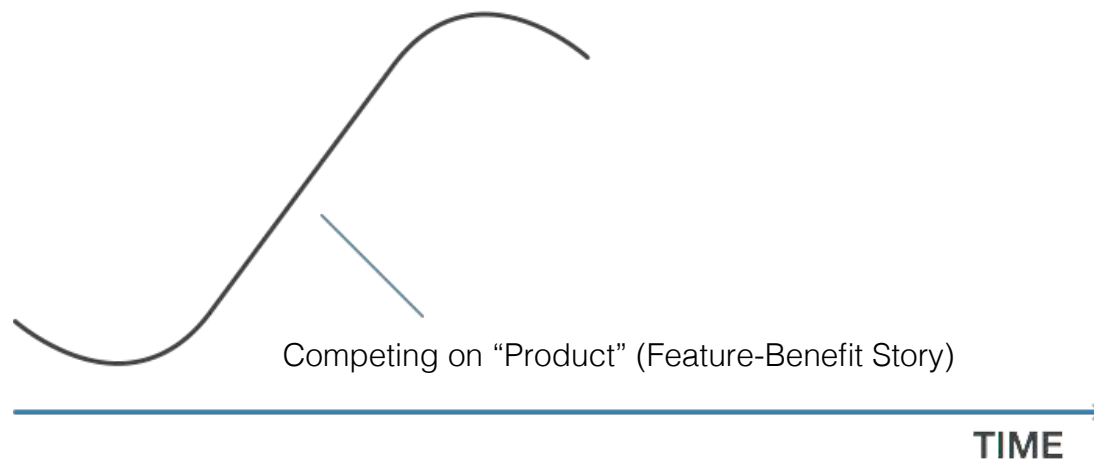
Data source: Health expenditure from the OECD; Life expectancy from the World Bank. Licensed under CC-BY-SA by the author Max Roser. The interactive data visualization is available at OurWorldInData.org. There you find the raw data and more visualizations on this topic.

Our Perspective:

- “Value” is an economic reorientation of health systems worldwide
- Market strategy shift is from product to outcome
- “We’re taking on risk” is overarching theme

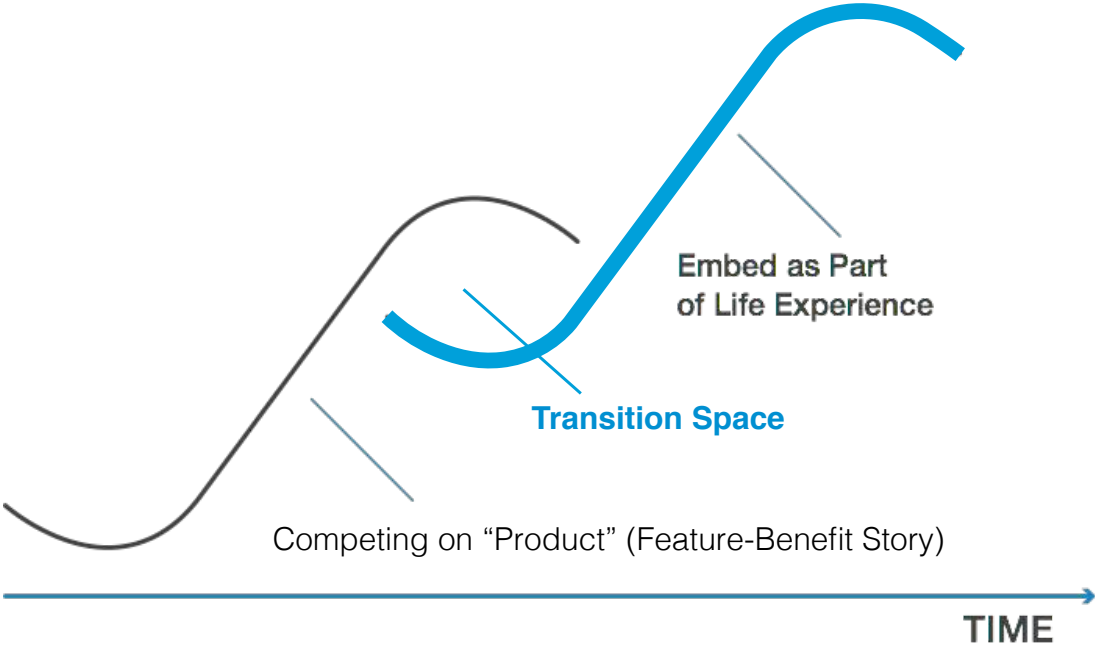
competing differently

THE NATURE OF BUSINESS STRATEGY HAS CHANGED



jumping to the next growth curve

THE SOFT OF SERVICE OVER THE HARD OF PRODUCT





Wipro Health:
Getting to Run-State Faster

john.singer@wipro.com

