

Connected Health

Delivering the promise



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September 18, 2009

Program Agenda:

8:00	Welcome & Introduction
8:10	Connected Health Study Findings
	Panel Presentations
8:40	Dr. Joe Kvedar
9:00	Thomas Barker
9:20	Jill Christians
9:45	Panel Discussion
10:25	Closing remarks

Agenda:

- 1** **The Study**
- 2** **Overall Findings**
 - 2.1** **Overall findings**
 - 2.2** **Different perspectives**
- 3** **What's possible?**
- 4** **Summary**

Get your thinking hat on...



\$ 2,000,000,000,000 = ~16% of GDP



64% physicians (*Taking the Pulse v9.0 Study by Manhattan Research*)



80% of people with access to the internet have searched for health information online (*Pew Internet & American Life Project*)

There is a need & an opportunity

THE STUDY

Aim to understand all sides of the story ...

- **Various stakeholders in healthcare**

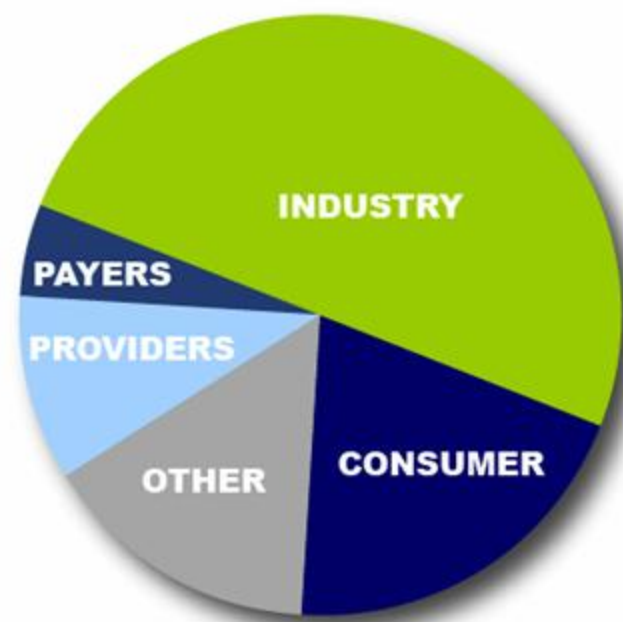
- Providers Payers Patients Industry

- **Sources**

- 20+ in-depth interviews
- Online survey - 100+ responses received
- Data from other studies and ongoing research

- **What did we ask?**

- Thoughts on state of healthcare today
- What people know of “Connected Health”
- Potential benefits
- Challenges foreseen



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State of healthcare today

- 1. Little focus on prevention**
- 2. Poor co-ordination among providers**
- 3. Fee-for-service is counterproductive**
- 4. Passive consumer culture**

OVERALL FINDINGS | State of Healthcare

Cost of overuse **\$210B**

Inefficient claims processing **\$210B**

Preventable hospital admissions **\$24B**

Medical Errors result **\$17B**

People using ER as a clinic **\$17B**

Source: PriceWaterhouseCoopers, Aug 2009

Lack of medication adherence **\$290B**
Source: NEHI

Cost of chronic disease management **70%**

**Contribute to
\$1.2T
waste**

OVERALL FINDINGS

What is Connected Health?

“Not heard of the term per say, but it probably has to do with electronic records”

*“Patients **connecting** to doctors and nurses **remotely**”*

“Use of devices to connect patients to the ‘mother ship’”

*“Use of communication and monitoring technologies to **provide care outside hospital settings**”*

*“Just connecting everything is not the solution. The value-add is **beyond the connection and going into co-ordination**”*

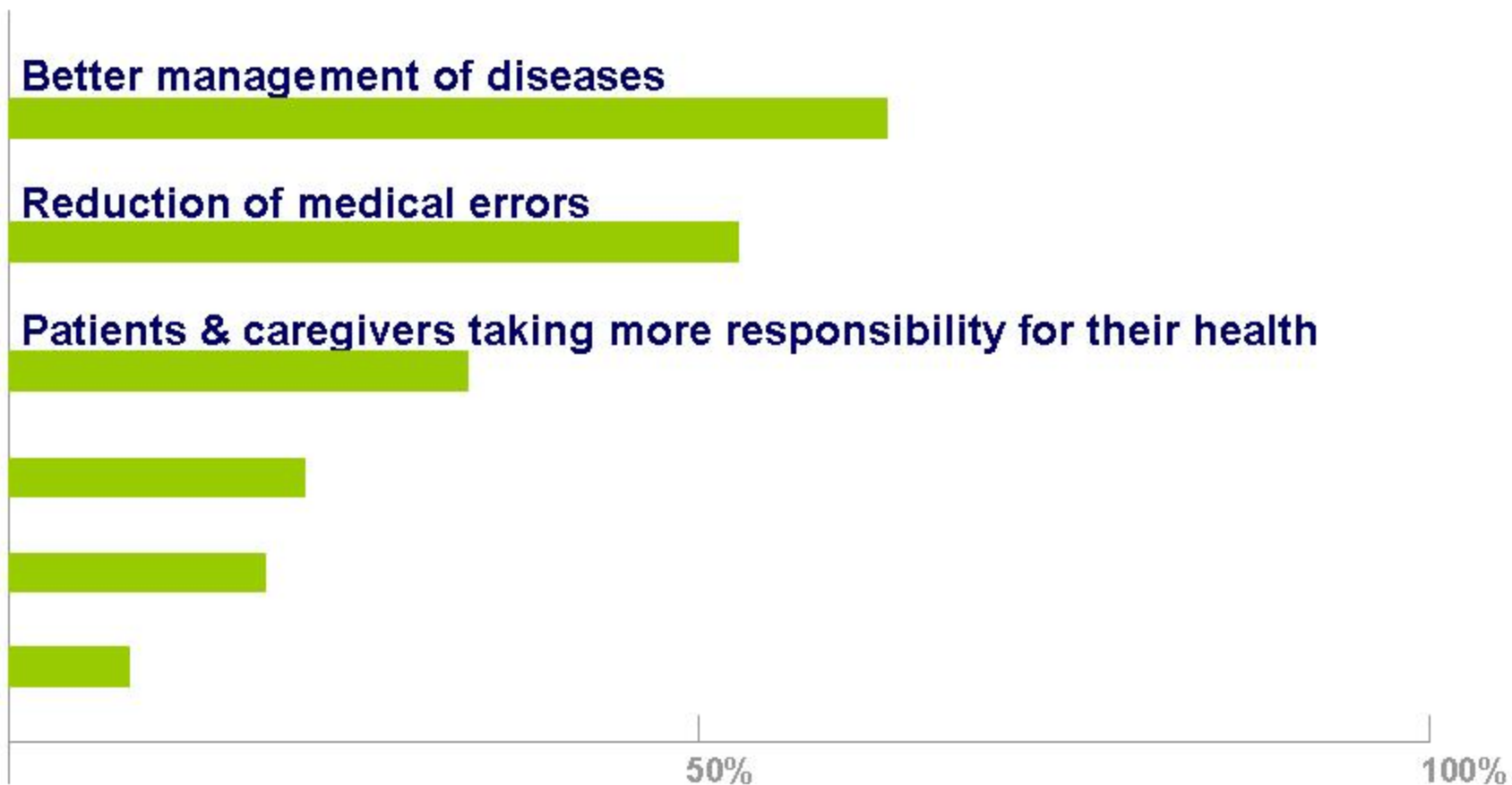
*“Its not just about moving data from point A to point B – it’s about **making the medical system smarter**”*

OVERALL FINDINGS

Are people aware of Connected Health?

40% are not

Those who are aware, recognize benefits of Connected Health



Benefits... in their own words

*“I'd like **integration of results across all providers and cohesiveness with preventative medicine objectives**”*

*“I'm a kidney cancer patient whose life was saved by (somewhat) **early detection** (...). Monitoring of conditions with minimal effort will result in early detection”.*

“I could have seen my record and, perhaps, prevented the medication error that almost killed me”

*“**Patients should be enabled to be more involved and in control of their healthcare, therefore seeing improved outcomes and happier patients/providers**”*

*“Eliminate unnecessary office visits, and implement **continuous preventative support especially if there's a chronic conditions such as diabetes, asthma, hypertension.**”*

OVERALL FINDINGS

Tremendous faith in potential to save healthcare \$\$

75%

people believe significant savings can be had

67%

people insist Connected Health should be a HIGH priority

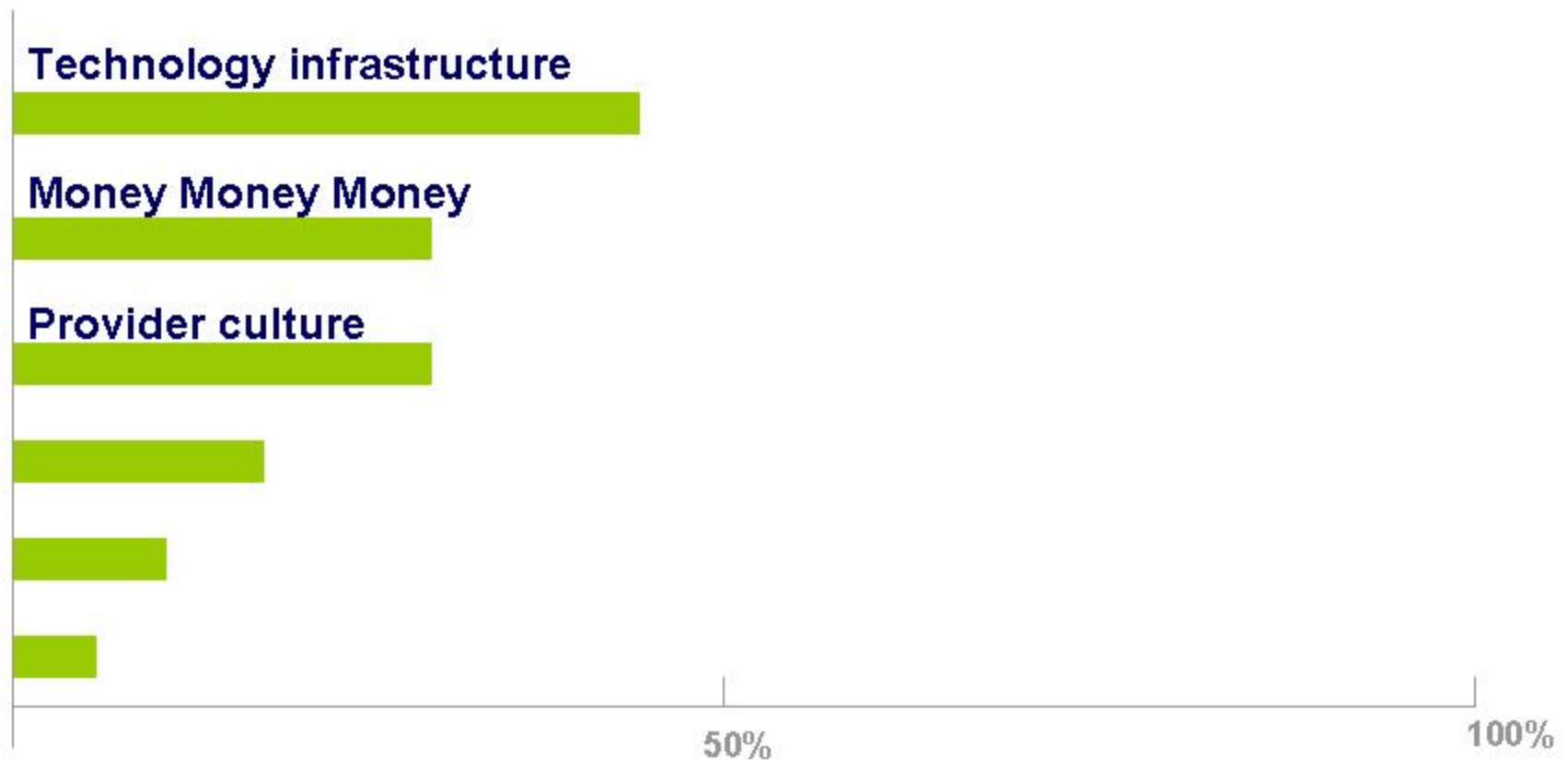


90%

people think widespread adoption will take at least 4 years .. maybe up to 15 years

What is wrong with this picture?

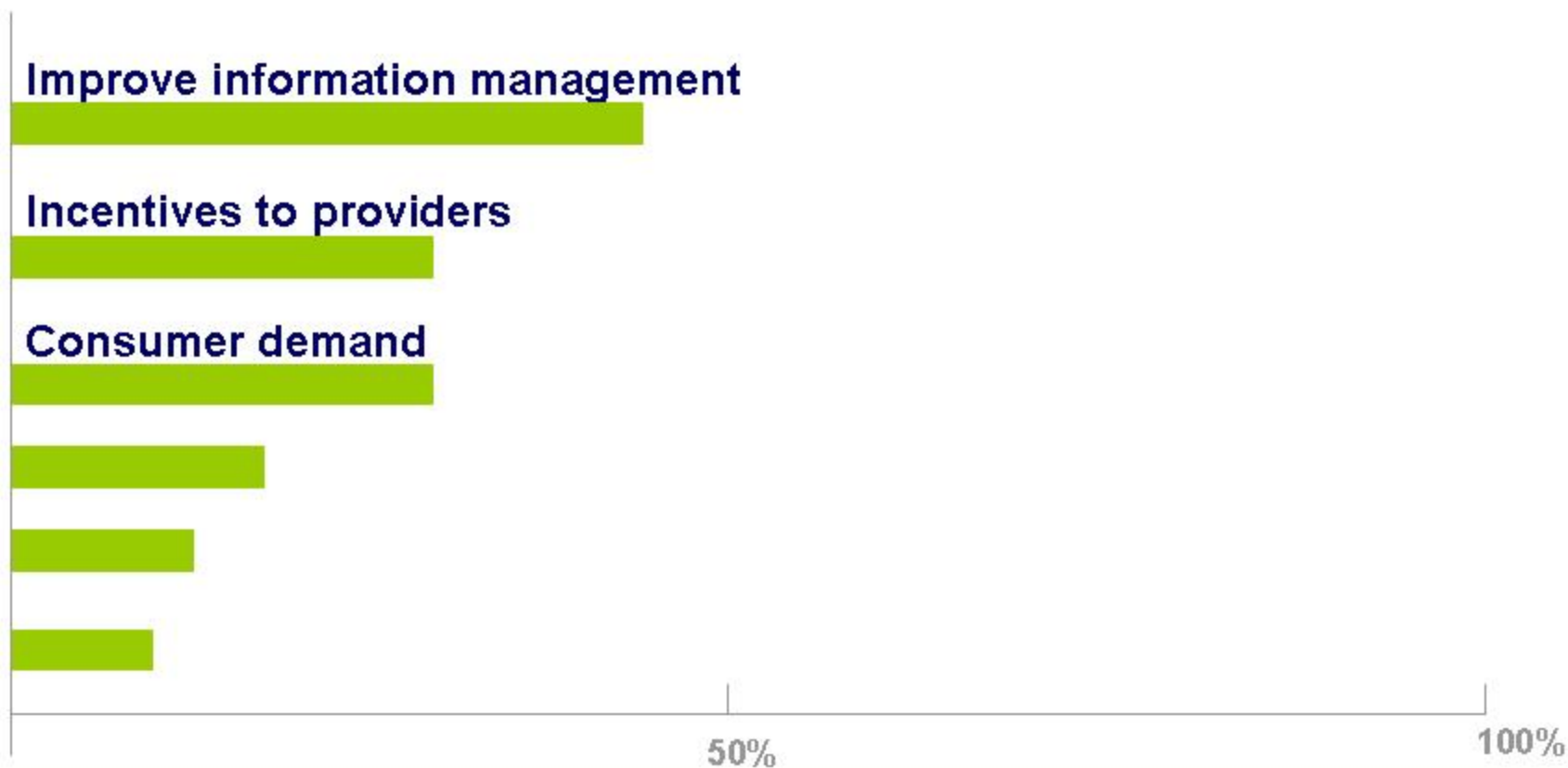
Significant challenges need to be overcome



Need a clear solution owner

OVERALL FINDINGS

How can we make it happen?



Who will drive adoption?

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DIFFERENT PERSPECTIVES

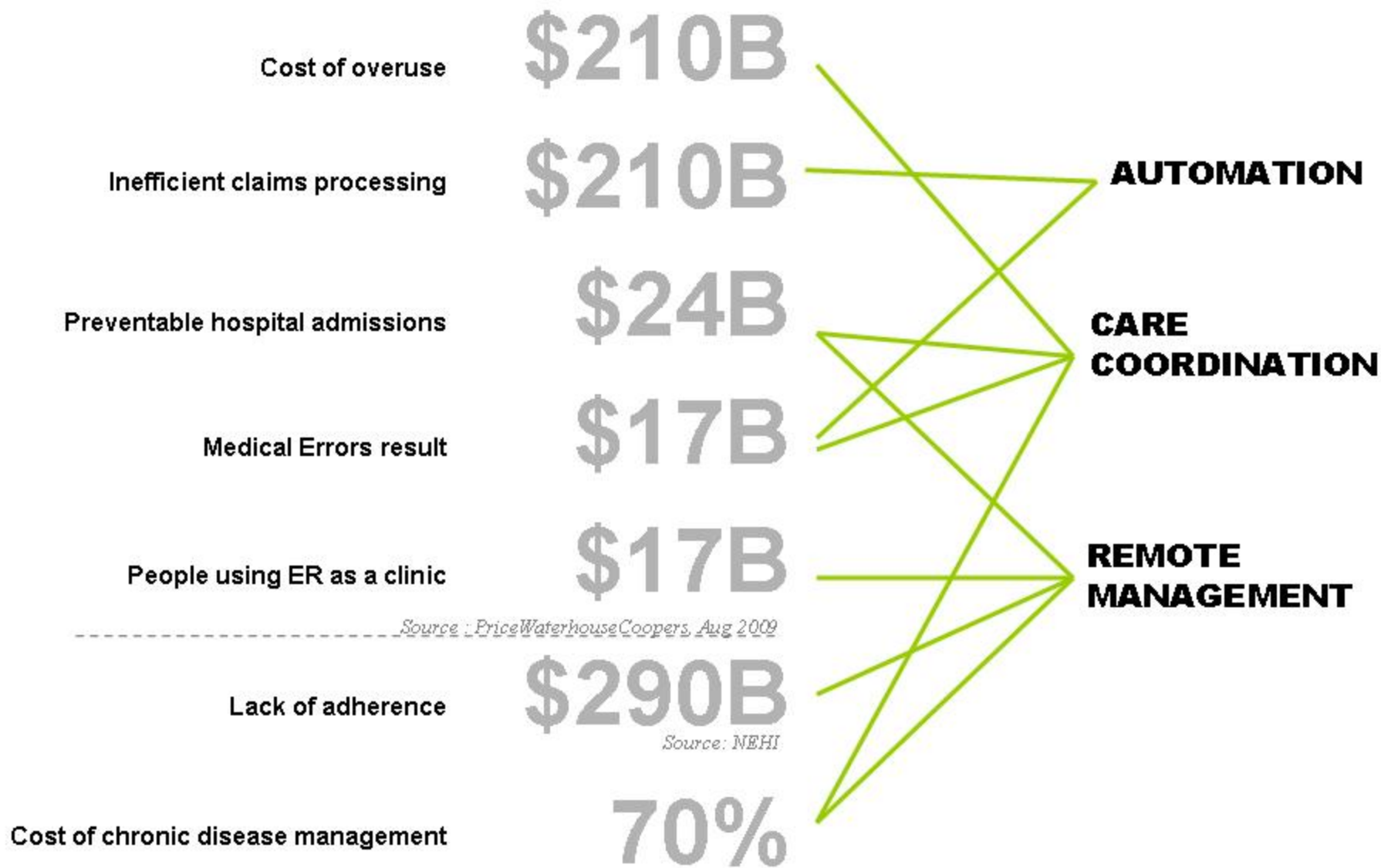
Every stakeholder has an interesting outlook



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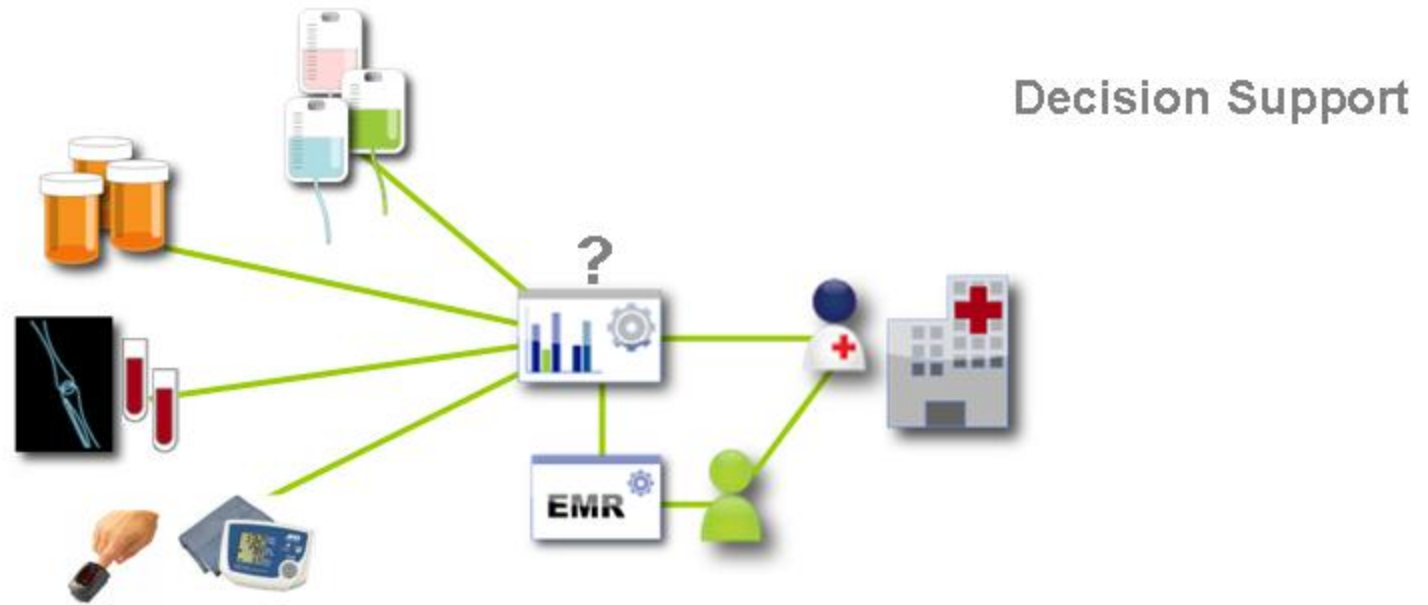
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WHAT'S POSSIBLE ? | Let's recap



What's possible?

Automation

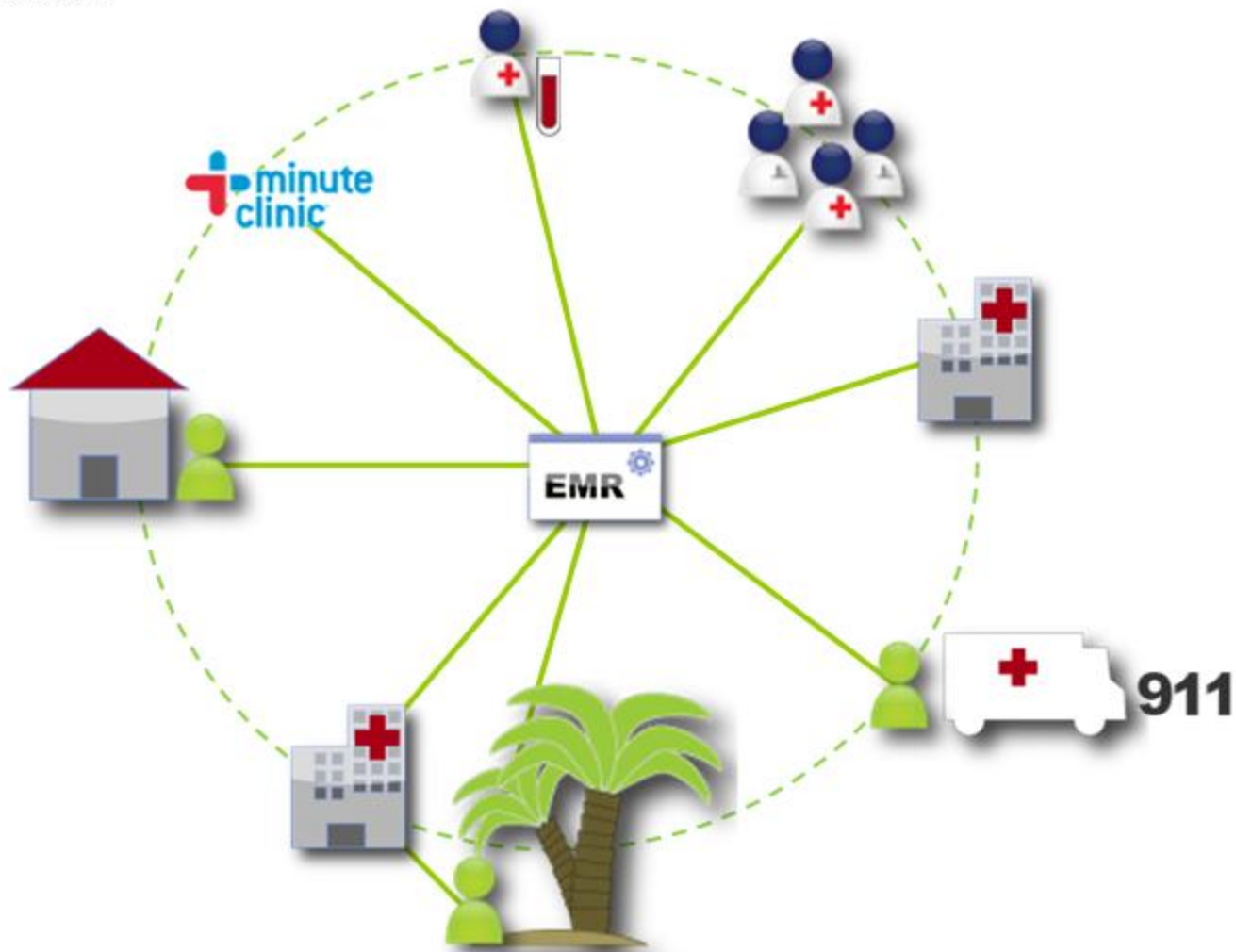


Billing



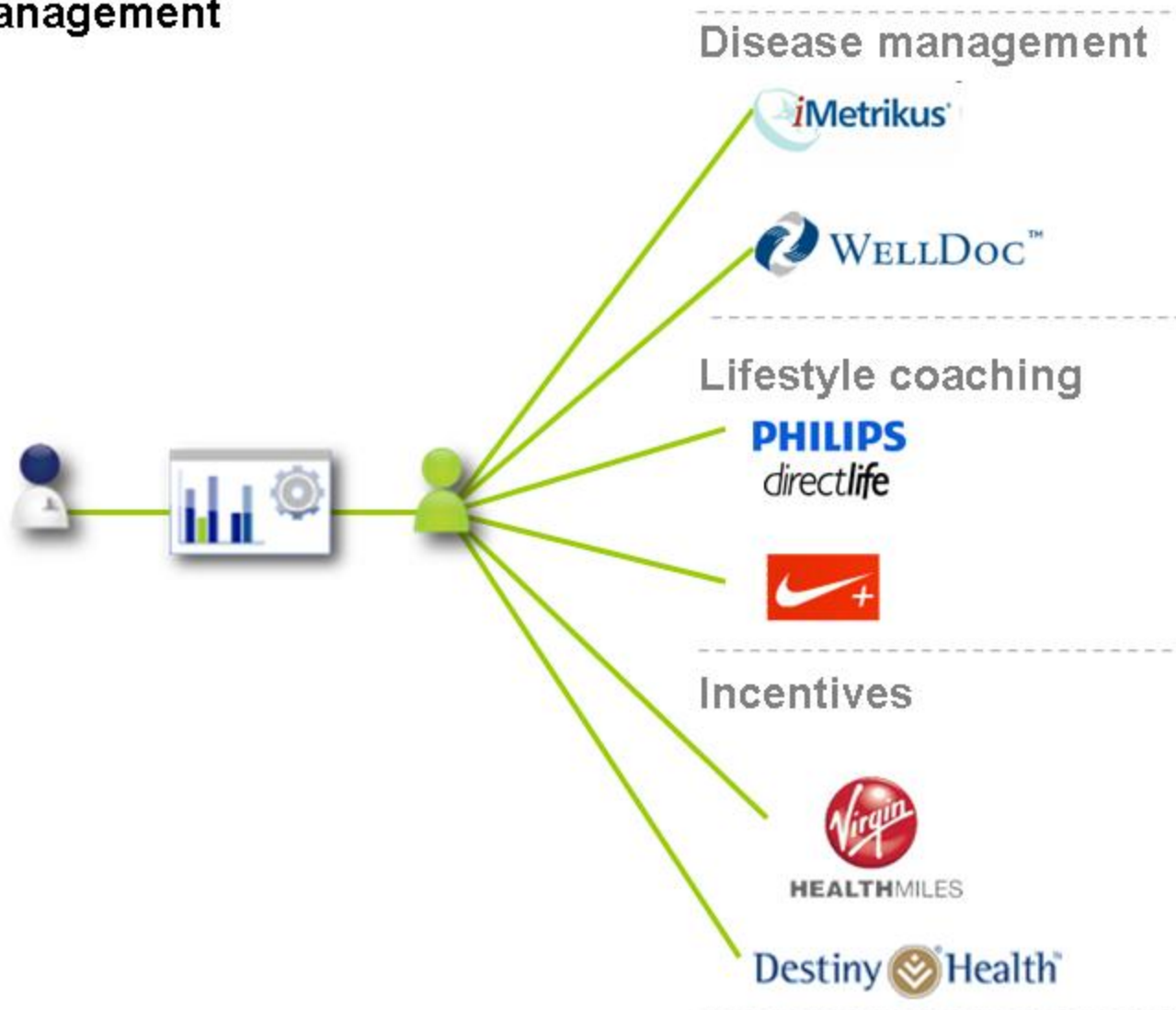
What's possible?

Care-coordination



What's possible?

Remote Management



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Summary

The promise of Connected Health...

- **Not many are aware**
- **Significant cost savings possible**
- **Challenges to be overcome**

A “Connected” mindset required

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