2020 Healthcare Landscape

Improving the health of our community through collaboration, leadership, and innovation.
Health or Healthcare?

Is it strategic innovation or

Is it tactical innovation

just adding an other layer to the solution vertical

Need to learn the market
Market was very complicated

Multi-layered

Some products were very binary

Highly regulated

Slow to accept change

Market study 2015
Inefficient communication leads to inadequate collaboration, which leads to **lost growth opportunities** and ultimately effecting the delivery of healthcare.
So where do I go from here?

Back to my roots........
Follow the Money

Look at strategic innovation.
Follow the Money

Payors, CMS
Follow the Money
Payors, CMS

Healthy

Unwell
Follow the Money
Payors, CMS
Follow the Money
Payors, CMS
Follow the Money
Payors, CMS
Follow the Money
Payors, CMS
Follow the Money
Payors, CMS

Healthy

Unwell
Follow the Money
Payors, CMS

Healthy

Unwell
Follow the Money
Payors, CMS

- Healthy
- Unwell
- Fee For Service
Follow the Money

Payors, CMS

Most of my 87k “marbles”

Solution vertical

Fee For Service

Home Health Services (CMS)
Follow the Money
Follow the Money

Solution Vertical
Follow the Money
Solution Vertical

illness
Follow the Money
Solution Vertical

illness

solution
Follow the Money
Solution Vertical

illness

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solution
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illness

solution
Follow the Money
Solution Vertical

illness

solution
Follow the Money
Solution Vertical

This solution model is Not sustainable.

What are we not asking?

What caused the health issue?
Follow the Money
Payors, CMS

Why am I not being treated here?

Healthy

Unwell

Home Health Services (CMS)

Fee For Service
Follow the Money
Payors, CMS

Preventive Medicine
Social Determinants

Healthy

Unwell

Home Health Services (CMS)

Fee For Service
Follow the Money
Payors, CMS

Preventive Medicine
Social Determinants
Population Health

Healthy

Unwell

Home Health Services (CMS)

Fee For Service

Austin Healthcare Council
Follow the Money
Payors, CMS

Healthy
Preventive Medicine
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Population Health

Unwell
Home Health Services (CMS)
Fee For Service

Austin Healthcare Council
Follow the Money

Payors, CMS

Very little

So, let’s look at international Healthcare model
International Single Payor Systems

• United Kingdom – National Health System
• Kingdom of the Netherlands
International Single Payor Systems

United Kingdom – National Health System
International Single Payor Systems

United Kingdom – National Health System

Lord David Prior (Chair, NHS England)

Visited for 3 days of interactive discussions & best practices between our two systems
Take away from meeting:

- Healthy
  - Preventive Medicine
  - Social Determinants
  - Population Health

- Unwell
  - Excessive wait Times
  - Voucher system
  - Fee For Service

Accelerate Moving to wheel/spoke Model

Because of people living longer

Current model not sustainable

Home Health Services (CMS)
International Single Payor Systems

United Kingdom – National Health System

Lord David Prior (Chair, NHS England)
Visited for 3 days of interactive discussions & best practices between our two systems

"I do hope that we can build on the great relationship that you have built with the ABHI and that we will meet again on many more occasions. I go back over the pond with great memories. Thank you!"
So now what?

AHC meeting with major Payors

What industry pressures will refocus our current process?

Healthy

Preventive Medicine
Social Determinants
Population Health

Unwell

Fee For Service

Home Health Services (CMS)
Disruptors in the Healthcare Space
Disruptors in the Healthcare Space

- Walmart, Amazon, Apple, Google
Disruptors in the Healthcare Space

- Walmart, Amazon, Apple, Google
- Aetna/CVS
Disruptors in the Healthcare Space

- Walmart, Amazon, Apple, Google
- Aetna/CVS
- United Healthcare/Optum
Disruptors in the Healthcare Space

- Walmart, Amazon, Apple, Google
- Aetna/CVS
- United Healthcare/Optum

Underlying common denominator:
Disruptors in the Healthcare Space

- Walmart, Amazon,
- Apple, Google
- Aetna/CVS
- United Healthcare/Optum

Underlying common denominator:
**Patient Centricity**
Follow the Money
Disruptors Focus

Disruptors focus on preventative care
Mostly self-insured

Employee is ill,
No problem,
go to the office

Fee For Service

Home Health Services
(CMS)
Follow the Money
Strategic Innovation

Where do you see yourself?

Healthy

Unwell

More focus on Preventative care

Center column will become narrower.

Fee For Service

More focus on Post care

Home Health Services (CMS)

My Take:

Industry Take:
Disrupting Healthcare through Innovation
(without throwing the baby out with the bathwater)

What I’d like for you to take away is to ask yourself where I fit into all this.

The true way to effect change in our healthcare ecosystem is through collaboration between disparate entities.

That if you find the right collaborative blend of healthcare, entrepreneurial, and mature IT sectors that you as leaders in healthcare can make effective sustainable improvements to our healthcare ecosystem.
Disrupting Healthcare through Innovation

Thank you
and
Best of luck to you in your life’s journey.