

HEALTH INNOVATION SUMMIT

BUILDING THE FUTURE HEALTH MARKETPLACE TOGETHER

FINANCIAL PLANNING

HOME-BASED MONITORING

ADVANCED
DIAGNOSTICS

CLINICAL CARE MODELS

RETAIL

GENOMICS

POPULATION HEALTH

SOCIAL MEDIA

AGENDA

February 5-6, 2013
Rosewood Crescent Hotel
Dallas, TX

TECHNOLOGY

WELLNESS AND LIFESTYLE

FROM VOLUME TO VALUE >

DAY 1 • February 5, 2013

The Galleries – Second Floor, Crescent Complex Building

**REFOCUSING HEALTHCARE ON VALUE AND SUSTAINABILITY –
THREE TRANSFORMATIONAL WAVES**

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| 12:00pm – 1:00pm | Arrival and Check-In <ul style="list-style-type: none">• Lunch provided in the Garden Room |
| 1:00pm – 1:45pm | Introduction to the Oliver Wyman Health Innovation Center (OWHIC) and the Three Waves of the Volume-to-Value Revolution <ul style="list-style-type: none">• Tom Main – Partner, Oliver Wyman• Jeff Margolis – Senior Executive Advisor, OWHIC• Adrian Slywotzky – Partner, Oliver Wyman |
| 1:45pm – 2:45pm | Convergence and Living in a Multi-Chain World <ul style="list-style-type: none">• Adrian Slywotzky – Partner, Oliver Wyman |
| 2:45pm – 3:15pm | Break and Refreshments |
| 3:15pm – 4:00pm | Wave 1 – Patient-Centered Care <ul style="list-style-type: none">• Introduction Framework: Jim Bonnette, MD – Partner and Chief Medical Officer, Oliver Wyman• Industry Perspective: Grace Terrell, MD – President and CEO, Cornerstone Health Care |
| 4:00pm – 4:45pm | Wave 2 – Consumer Engagement <ul style="list-style-type: none">• Introduction Framework: Jeff Margolis – Senior Executive Advisor, OWHIC• Industry Perspective: Peter Hudson, MD – Co-Founder and CEO, iTriage |
| 4:45pm – 5:30pm | Wave 3 – Science of Prevention <ul style="list-style-type: none">• Introduction Framework: Adrian Slywotzky – Partner, Oliver Wyman• Industry Perspective: Jim Hudson – Co-Chairman and Founder, HudsonAlpha Institute for Biotechnology |
| 5:30pm – 6:00pm | Getting 2025 in Focus – Value Roulette <ul style="list-style-type: none">• Jeff Margolis – Senior Executive Advisor, OWHIC |
| 6:30pm – 7:30pm | Evening Activity – Executive Networking and Cocktail Hour <ul style="list-style-type: none">• The Crescent Club, 17th Floor of the Towers |
| 7:30pm – 10:00pm | Dinner – The Crescent Club, 17th Floor of the Towers
– With Discussion on Leading Highly Innovative and Disruptive Organizations <ul style="list-style-type: none">• Special Guest Speaker: Robert Margolis, MD – Managing Partner and CEO, DaVita HealthCare Partners |

“ Healthcare must compete on value. There’s no reason not to. We already have business and clinical models that leapfrog the status quo but must be diffused to the millions where this type of care is out of reach. Anything less is a modern tragedy. ”

Tom Main
Oliver Wyman
Partner and U.S. Market Leader

DAY 2 • February 6, 2013

The Galleries – Second Floor, Crescent Complex Building

WORKING TOGETHER TO BUILD THE NEW HEALTH MARKETPLACE

7:30am – 8:00am	Welcome and Breakfast
8:00am – 8:15am	Introduction to Day 2 <ul style="list-style-type: none">• Tom Main – Partner, Oliver Wyman
8:15am – 9:00am	New Health Market Structure and Future Business Designs for the Multi-Chain World <ul style="list-style-type: none">• Tom Main – Partner, Oliver Wyman
9:00am – 10:00am	Innovation/Diffusion Challenge: Two Breakthrough Models <ul style="list-style-type: none">• Wave 1: Jeanne Cohen – CEO, newMentor• Wave 2: Jason Keller – Chief Operating Officer, WellTok
10:00am – 10:15am	Break and Refreshments
10:15am – 11:15am	Capital Markets Fueling Innovation, Consolidation, and the Market Pivot to Patient-Centered Care <ul style="list-style-type: none">• Charles Boorady – Managing Partner, TripleTree Capital Partners• Rob DiGia – Managing Director, Global Head of Healthcare Group, UBS Investment Bank
11:15am – 11:45am	The Next \$10 Billion Markets <ul style="list-style-type: none">• Terry Stone – Partner, Oliver Wyman
11:45am – 12:30pm	Lunch – Onsite
12:30pm – 1:30pm	Panel Discussion – The Leadership Opportunity Moderator: Adrian Slywotzky – Partner, Oliver Wyman <ul style="list-style-type: none">• Pat Geraghty – CEO, Florida Blue• Alan Hoops – Former Chairman and CEO, Caremore, Current Executive Chairman, Health Essentials• Craig Samitt, MD – President and CEO, Dean Health System• Glen Tullman – Former CEO, Allscripts
1:30pm – 1:45pm	Fitness Challenge Reward <ul style="list-style-type: none">• Leslie Silverglide – Co-Founder, Wello
1:45pm – 2:15pm	The New Generation of Health Leaders <ul style="list-style-type: none">• Tom Main – Partner, Oliver Wyman
2:15pm – 2:30pm	Summit Closing

“Healthcare is going to see new entrants come at the same problem with a very different mindset. They don’t care at all how it was done in the past. They ask an entirely new set of questions. That leads to the kind of creative solutions we hadn’t seen in the last ten, twenty, thirty years.”

Adrian Slywotzky
Oliver Wyman
Partner

WHY ATTEND THE SUMMIT?

A NEW VISION OF VALUE FOR THE MARKET

- Key insights on how the market will evolve
- Compelling perspectives on how value will migrate among existing and new players
- Closer looks at best-practice players who are already thriving in a value-based market
- A powerful framework for convergence – a deep look at the four chain world that redefined the media and technology markets

PROVOCATIVE LEADERSHIP QUESTIONS FOR AN EVOLVING WORLD

- Insights on the changing dimensions of competition and what it takes to thrive in the new world
- A map of market opportunity and the next set of multi-billion dollar ideas
- In-depth examination of emerging business models in a converged healthcare world

COLLABORATIVE CROSS-SECTOR INSIGHT

- Panel discussions that explore pressing issues in the market from multiple points of view
- Networking with other executives with a careful balance of perspectives from across the healthcare sector

ABOUT OLIVER WYMAN

Oliver Wyman is a global leader in management consulting. With offices in 50+ cities across 25 countries, Oliver Wyman combines deep industry knowledge with specialized expertise in strategy, operations, risk management, and organization transformation. The firm's 3,000 professionals help clients optimize their business, improve their operations and risk profile, and accelerate their organizational performance to seize the most attractive opportunities. Oliver Wyman is a wholly owned subsidiary of Marsh & McLennan Companies [NYSE: MMC], a global team of professional services companies offering clients advice and solutions in the areas of risk, strategy, and human capital. With 52,000 employees worldwide and annual revenue exceeding \$10 billion, Marsh & McLennan Companies is also the parent company of Marsh, a global leader in insurance broking and risk management; Guy Carpenter, a global leader in risk and reinsurance intermediary services; and Mercer, a global leader in human resource consulting and related services.

Oliver Wyman's Health & Life Sciences practice serves clients in the pharmaceutical, biotechnology, medical devices, provider, and payer sectors with strategic, operational, and organizational advice. Deep healthcare knowledge and capabilities allow the practice to deliver fact-based solutions.

Oliver Wyman has recently launched a Healthcare Innovation Center (OWHIC) dedicated to promoting positive change in healthcare. OWHIC will champion innovation by disseminating proven innovations; envisioning market-based solutions to today's and tomorrow's challenges; and establishing a cross-industry community of thought-leaders to share and shape ideas.

For more information, visit www.oliverwyman.com

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