

OVERVIEW, ADVISORY BOARD, AND LEADERSHIP 2015

An Introduction to the **Oliver Wyman Health Innovation Center**

The Oliver Wyman Health Innovation Center (OWHIC) is founded on the belief that healthcare can and must compete on value. We believe that the industry will be redesigned from the patient's perspective – with an unrelenting focus on improving patient value. OWHIC has high expectations for what is possible based both on the innovation already in the market that has not been fully diffused or crossed industry lines and the big promise of what is on the horizon. In this world, consumers will expect to get from healthcare what they already get from any other tech-powered industry – five percent lower costs and twenty percent more value every year.

We believe this vision for healthcare is possible by unleashing the power of the markets (private and public) to redesign our health system. Patient-centered pioneers have already demonstrated amazing results, delighted their customers, and outperformed traditional fee-for-service competitors in spite of current market constraints. Their innovations have been proven but not diffused. To close this gap and design the next generation of breakthrough models, the center has convened more than 40 leaders and successful innovators as part of our Advisory Board (see next page for list). This group representing the health services marketplace, market enablers, consumer engagement, capital markets, and academia is working together to accelerate the market's race to value.

Our Mission Statement

- Develop market-based solutions to unlock value and overcome healthcare's present-day morass of perverse incentives and competitive inefficiencies
- Identify and promote the best current models for care delivery, reimbursement, and patient engagement to create an upward spiral of improvement and reinvestment
- Conceive, develop, and drive solutions that integrate the best of the retail, social media, and technology industries to reset what is expected of a new health market

To learn more about the center's work, contact owhic@oliverwyman.com

For further information on the Oliver Wyman Health Innovation Center, including our latest thought work and events, please visit www.oliverwyman.com/owhic

ADVISORY BOARD

ADVISOR	TITLE	ORGANIZATION
HEALTH SERVICES MARKETPLACE		
Richard Afable, MD	President and Chief Executive Officer Executive Vice President, Southern California Region	St. Joseph Hoag Health
John Doyle	Executive Vice President President and Chief Executive Officer	Ascension Health Alliance Ascension Health Holdings
Brent Estes	President and Chief Executive Officer Senior Vice President	Rush Health Rush University Medical Center
Rushika Fernandopulle, MD	Co-Founder and Chief Executive Officer	Iora Health
Patrick Geraghty	Chairman and Chief Executive Officer	GuideWell
Lawrence Herman	Chair of the Board of Directors	American Academy of Physician Assistants (AAPA)
Robert Margolis, MD	Managing Partner and Chief Executive Officer	DaVita HealthCare Partners
Bruce Moore	President, Operations and Service Lines Group	Hospital Corporation of America
Maureen O'Connor	Executive Vice President President	Diversified Businesses Mosaic Health Solutions
Matt Portch	Vice President, Commercial Model Innovation	Pfizer, Inc.
Eric Schultz	President and Chief Executive Officer	Harvard Pilgrim Health Care
Sam Srivastava	Chief Executive Officer	Magellan Healthcare, Magellan Health
Grace Terrell, MD	President and Chief Executive Officer	Cornerstone Health Care
Tony Tersigni	President and Chief Executive Officer	Ascension Health Alliance
MARKET ENABLERS		
Jeanne Cohen	Founder and Chief Executive Officer	Motive Medical Intelligence
Jason Gorevic	Chief Executive Officer	Teladoc Medical Services
Dennis Grimaud	Chairman and Chief Executive Officer	DIATHERIX Laboratories
Jim Hudson	Co-Chairman and Founder	HudsonAlpha Institute for Biotechnology
Lynn Hudson	President	Concero Scientific
Brad Perkins, MD	Chief Medical Officer	Human Longevity, Inc.
Emad Rizk, MD	President and Chief Executive Officer	Accretive Health
CONSUMER ENGAGEMENT		
Travis Bogard	Vice President, Product and Strategy	Jawbone
Dave Chase	Former Senior Vice President	WebMD
Derek Flanzraich	Founder and Chief Executive Officer	Greatist
Peter Hudson, MD	Board Chairman Former Co-Founder and Chief Executive Officer	Emergency Medicine Physicians iTriage, LLC
Jason Langheier	Founder and Chief Executive Officer	Zipongo
Jeff Margolis	Chairman and Chief Executive Officer	Welltok, Inc.
Andrew Rosenthal	Product Manager, Health Platform	Jawbone
Robert Thompson	Executive Vice President, Pharmacy	Rite Aid Corporation
Glen Tullman	Chief Executive Officer	Livongo Health
CAPITAL MARKETS		
Charles Boorady	Managing Partner	TripleTree Capital Partners
Rob DiGia	Managing Director, Global Head of Healthcare Group	UBS Investment Bank
Eric Langshur	Chief Executive Officer	AVIA Health Innovation
NON-PROFIT		
Esther Dyson	Founder Chairman	HICcup EDventure Holdings

LEADERSHIP



Terry Stone leads the firm's global Health and Life Sciences practice group and its mission to transform healthcare. Terry has extensive experience in the healthcare industry across payer, provider, pharmaceutical and biotech, as well as health enablement companies.

She is an expert in devising growth strategies, improving the cost and quality of healthcare services, establishing innovative partnerships across healthcare sectors, developing ACOs and other value-based solutions, and redesigning organizations to support their strategic transformations. She is a regular speaker on the topic of women in business and transforming healthcare.



Tom Main is a partner and U.S. market leader for Oliver Wyman's Health and Life Sciences practice group and chairman of the Oliver Wyman Health Innovation Center (OWHIC). He is a trusted advisor to Boards and CEOs and is a recognized thought leader and speaker on industry restructuring, value migration, new business models, and positioning companies for outsized growth. Tom has collaborated with Adrian Slywotzky on three major thought pieces: "The Quiet Healthcare Revolution" published in *The Atlantic*, "The Volume-to-Value Revolution", and most recently, "The Patient-to-Consumer Revolution."

ABOUT OLIVER WYMAN

Oliver Wyman is a global leader in management consulting. With offices in 50+ cities across 26 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 Health 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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