

2018 OLIVER WYMAN HEALTH INNOVATION SUMMIT

Tentative Agenda – Subject to Change

AGENDA

Monday, November 5, 2018

REGISTRATION

1:00 - 6:00 PM *Join us for a smooth, seamless registration in the Fairmont lobby*
The Fairmont Dallas | 1717 N. Akard Street | Dallas, Texas, 75201

IMMERSION TOURS

1:30 - 4:30 PM *Explore how the Dallas area's most innovative organizations are transforming the health market through on-site, interactive tours. Advanced registration is required, and is on a first come first serve basis*

C1 Innovation Lab

Determined Design: Collaborative Thinking Towards Consumer-Centric Solutions

Health Wildcatters

Shared Value: Behavioral Health, When and Where We Need It

Momentous Institute

Better Learning: Innovation at the Intersection of Mental Health and Education

Teladoc Health

Healthcare Access Transformed: Anytime, Anywhere

UT Southwestern Simulation Center

Simulation: Advancing the Art of Medical Education

WELCOME MIXER

5:30 - 6:45 PM *Kick off the Summit with fellow senior health industry leaders over cocktails and hors d'oeuvres*

DINNER RECEPTION AND KEYNOTE SPEAKERS

7:00 - 9:30 PM *Keep the conversation going over a sit-down dinner – and take a moment to enjoy a dynamic conversation about healthcare's biggest challenges*

Thinking Big: Finding the Leverage Points to Change an Industry

Craig E. Samitt, MD - President & CEO, Blue Cross Blue Shield of Minnesota; Karen DeSalvo, MD, MPH, MSc - Professor, Dell Medical School, Former Acting Assistant Secretary, US Dept. of Health and Human Services (HHS); Sam Hornblower - Producer, *60 Minutes*

- Archimedes said, "Give me a place to stand, and a lever long enough, and I will move the world." Karen DeSalvo, Craig Samitt, and Sam Hornblower know about long levers. Karen led efforts to manage the devastating impact of Hurricane Katrina in New Orleans, set a national strategy for health IT as National Coordinator for Health Information Technology, and is now helping to reshape medical education at Dell Medical School. Craig served as a MedPAC commissioner for six years, led both HealthCare Partners and Dean Health System as President & CEO, set Anthem's clinical strategy as Chief Clinical Officer, and now serves as President & CEO of Blue Cross Blue Shield of Minnesota. Sam Hornblower of *60 Minutes* has led award-winning investigations into the opioid crisis, falsified clinical trials, fraudulent hospital billing, and more. This will be fun.

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Tuesday, November 6, 2018

WELLNESS WAKE UP ACTIVITY

6:30 - 7:15 AM *Start the day off right with an energizing, low-impact wellness activity*

BREAKFAST

7:00 - 8:00 AM *Reconnect with old friends and make new ones over a healthy meal*

MAIN STAGE SESSIONS

- 8:00 - 10:00 AM **Disrupting with the Stars: Lessons from a Twice-Disrupted Industry**
Andrea Wong – Former President, International Production, Sony Pictures Television & Former President, International, Sony Pictures Entertainment
- Consumers rapidly moving away from monolithic integrated providers to new specialized startups. A new generation that values authenticity and peer advice over production value. Technology that breaks down geographic boundaries and massively lowers barriers to entry. Billionaires who think they know how to save the industry. And big bets that sometimes pay off – but often serve as “learning opportunities” at best. Sound familiar? The inevitable changes in healthcare have already happened in the media industry – and Andrea Wong not only lived to tell about it, but helped to lead the revolution. What lessons can we learn from her experience (and what mistakes should we avoid)?
- Economies of *UnScale*: Rethinking Competitive Advantage in a Capital-Light World**
Glen Tullman – CEO, Livongo; Hemant Taneja – Managing Director, General Catalyst; Stephen K. Klasko, MD, MBA – CEO, Thomas Jefferson University and Jefferson Health
- It’s no coincidence that in the first decade of the 21st Century, Amazon launched Amazon Web Services, Apple introduced the iPhone, Facebook opened its API to developers, and both Airbnb and Uber were launched. Advanced technology has created completely new business models, allowing nascent players to disrupt staid industries by scaling fast, without the need for massive capital investments. The same is now true in healthcare. How do industry incumbents adapt as their traditional capital advantages suddenly become albatrosses?

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Tuesday, November 6, 2018 (continued)

EXECUTIVE SESSIONS

10:15 - 11:15 AM *Participate in a focused session to learn, share, connect, and discuss what it takes to break boundaries in the health ecosystem*

When Health and Wellness Collide: Who Will Address Tomorrow's 'Point Solution' Integration?

Ellen Kelsay – Chief Strategy Officer, NBGH; Matt Eurey – SVP, Strategic Alliances, Accolade; Swati Mathai – Chief Client Officer, National Accounts, Anthem

- In the recent boom economy, employers have been investing in health and wellness programs to win the war on talent while curbing healthcare spend. But point solution fatigue is setting in - join us to debate what comes next.

Knock, Knock. Who's There? Who Will be Waiting at Healthcare's New Front Door?

Joshua Riff, MD – CEO, Onduo; Marcus Osborne – VP, Health & Wellness Transformation, Walmart; Mark Muller – SVP, System Strategy and Business Development, Ochsner

- As technology is evolving and the ecosystem shifts, healthcare's entry point is in transition. Explore the push-pull as new entrants challenge traditional players to own tomorrow's "new front door" of care.

The AI Effect: Health Workforce Redefined

Austin Gispanski – VP, Strategy, Exela Technologies; Jory Tremblay – Managing Director, US Growth, Babylon Health

- Automation is on pace to surpass human performance in the (very near) future. Will we even recognize the jobs of tomorrow? Join us to debate how AI will shape the future health workforce.

#HEALTHEVERYWHERE INNOVATION EXPERIENCE

10:15 - 11:15 AM *What if your doctor understood your eating habits as well as Netflix understood your viewing habits? What if lab tests were delivered on your timeline, as conveniently as Uber Eats delivers your dinner? What if, in a crisis, the emergency room came to you?*

Control, convenience, and connectivity abound across industries. What would that look and feel like in healthcare?

Join us at the **#HealthEverywhere Innovation Experience**, where you will see how organizations today are transforming care delivery tomorrow. Continue the experience at the **#HealthEverywhere Hands On Device Bar** throughout the Summit

Session to be repeated at 12:45 PM and 2:00 PM

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Tuesday, November 6, 2018 (continued)

LUNCH

11:15 - 12:45 PM *Grab some lunch, network, and discuss the morning sessions*

11:15 - 12:00 PM Concurrent Session: **Changing the Game: Innovators Redefining Health**
(Powered by Maven Clinic, Quantum Health, Virgin Pulse, and Wellframe)

Innovation showcase designed to highlight companies that are actively challenging the 'status quo' in healthcare. A curated set of novel offerings that will – if/when applied at scale – undoubtedly transform the industry.

EXECUTIVE SESSIONS AND #HEALTHEVERYWHERE INNOVATION EXPERIENCE

12:45 - 1:45 PM **#HealthEverywhere Innovation Experience** – see description on [prior page](#)

Executive Sessions:

Innovation as a Competitive Edge: How to Make Innovating Through Partnership Successful

Clint Porch – Manager, Marketing and Capability Development, Florida Blue; Eran Orr – Founder and CEO, VRHealth; Maneesh Goyal – Chief Solutions Officer, Welltok; Scott Frisch – EVP & COO, AARP

- Innovation isn't easy to achieve. Explore different ways organizations are partnering to achieve innovation, and how they're making their partnerships successful.

(Zip) Code Blue: How Social Determinants of Health Transform Approaches to Care

Chris Chen, MD – CEO, ChenMed; Trenor Williams, MD – CEO, Socially Determined

- Healthcare is increasingly recognizing the importance of non-traditional personal information in shaping patient understanding - but what happens once we have that data? Learn how care models are evolving to incorporate social determinants of health.

Pharma Evolution: Changing the Game with Payers, Providers, and Everyone in Between

Chris Hogg – Chief Commercial Officer, Propeller Health; Rachel Sha – VP, Digital Business Development & Licensing, Sanofi

- Do pharmaceutical companies exist to create drugs, or create cures? In an effort to go big on the latter, pharma is bringing unprecedented value to the ecosystem as new collaboration models look to optimize outcomes, beyond just the pill.

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EXECUTIVE SESSIONS AND #HEALTHEVERYWHERE INNOVATION EXPERIENCE

2:00 - 3:00 PM **#HealthEverywhere Innovation Experience** – see description from [page 3](#)

Executive Sessions:

Extreme Makeover: Modernizing the Benefit Stack to Deliver Value and Peace of Mind

Ashok Subramanian – Founder and CEO, Centivo; Tal Gilbert – CEO, Vitality

- After years of cost-shifting to employees (like CDHPs with high deductibles), employers are running out of levers to control health spend - and costs are still rising. Employees are demanding more, but getting less. How can value be found? Learn how innovators are hoping to reboot and redefine the traditional benefit stack.

What the Doctor Ordered: Shaping Physician Culture to Drive Value

Caroline Chebli – Orthopedic Surgeon, Kennedy White Orthopedic Center; Mandy Mangat, MD, MPH – CMO, Navvis; Scott Pierce – COO, BCBST

- Transformational care requires a shift in the mindset of those delivering it ... front-line physicians. Yet shaping physician behavior can seem far from achievable, as coordination of care services is often fragmented and aligning stakeholder objectives complex. Hear how organizations are “cracking the code” to shape physician practices, ultimately achieving better quality and more affordable care.

(Block)chain Reaction: Should I Care?

Ambar Bhattacharyya – Managing Director, Maverick Ventures; Noah Zimmerman – Director, Health Data and Design Innovation Center, Icahn School of Medicine at Mount Sinai

- Blockchain has been touted as a technology that could fundamentally alter the economy. Join us as we dispel common misconceptions, explain the technology, and delve into the business potential.

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Tuesday, November 6, 2018 (continued)

MAIN STAGE SESSIONS

3:15 - 5:00 PM

Ever Seen Someone with a Tattoo of a Healthcare Logo?

Eric Grossman – CEO & Founder, NextHealth Technologies; Jessica Gelman – CEO, Kraft Analytics Group (KAGR)

- Professional sports is the ultimate consumer industry. Winning the game requires skill and practice; winning in the business of sports requires objective strategy, flawless execution, and – most importantly – data. Building and monetizing loyalty from the stands to the smartphone (and everywhere in between) requires a holistic view of the consumer well beyond their interactions with the team. Similarly, in healthcare, creating true loyalty requires understanding how consumers behave during the majority of their lives when they're not receiving care. Can healthcare organizations create true fans like the best sports teams do?

Moving from Personalized Medicine to Personalized Health

Eric Dishman – Director, All of Us Research Program, National Institutes of Health

- In healthcare, we're all just statistics. Care plans, medical policies, and treatment recommendations are based on what is "typical" – yet every one of us is different. As an industry, we've made great strides in personalized medicine, and we now have drugs that are literally customized for every patient. Yet what about personalized health? How do we discard all that is harmful about standardization and scale, and take advantage of new technologies and new ways of operating that can allow us to deliver truly tailored care for every individual we serve?

The Pantry is a Medicine Cabinet

Jason Langheier, MD, MPH – Founder & CEO, Zipongo; Marcus Osborne – VP, Health & Wellness Transformation, Walmart; Randy Oostra – President & CEO, ProMedica

- Obesity is the leading cause of death in all but name, contributing directly to the top three causes of death in the United States. Food doesn't simply impact health – it creates (or destroys) it. Yet we still treat food as a "public health" issue, a "social determinants" issue, a "lifestyle" issue. What do we need to do to make food as central to the care we provide as antibiotics or statins? And how can we accelerate this change in mindset by taking advantage of recent regulatory changes such as coverage of food under Medicare Advantage?

EVENING COCKTAILS: "DRINKS AND INK"

6:00 - 7:30 PM

Round out the day over some drinks and appetizers

ELECTION WATCH PARTY

9:30 – 11:00 PM

Break traditional convention and engage in conversations about politics as the results from the midterm elections (and Louisiana primaries) come in

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Wednesday, November 7, 2018

BREAKFAST

7:00 - 8:00 AM *Enjoy breakfast while making lasting connections with old and new friends*

MAIN STAGE SESSIONS

8:00 - 9:30 AM

Life, Liberty, and the Pursuit of Free Data

Aneesh Chopra – President, CareJourney; Former US Chief Technology Officer

- 2,314 billion gigabytes of healthcare data will be produced in 2020 – growing at 50% annually. The potential value of these data is massive, but what needs to happen before we can actually realize it? The regulatory system is in place. The technological platforms are getting there. Now, we need industry players to leverage the regulatory framework and tech savvy workforce. Aneesh Chopra, former CTO for the United States, will dive into how data liberation – and true, easy access by consumers to all of their information – will drive the next wave of innovation that redefines care across the board.

Never Mind: Integrating our Split Systems

Linda Rosenberg – President & CEO, National Council for Behavioral Health; Patrick J. Kennedy – Former US Representative (D-RI), Founder, The Kennedy Forum; Thomas R. Insel, MD – Co-founder & President, Mindstrong Health

- The United States faces a mental health epidemic. Nearly one in five American adults suffers from a form of mental illness. Suicide rates are at an all-time high, 115 people die daily from opioid abuse, and one in eight Americans aged 12 and over take an antidepressant daily. Yet we still operate two healthcare systems in this country – one for the body, and an inferior one for the mind. How do we bring these two systems together, move beyond treating mental health as simply a cost issue, and make mental health simply health?

“DEEP DIVE” DISCUSSIONS

9:45 - 10:45 AM *Exchange ideas and challenge assumptions through an open dialogue with industry peers who share a common passion for solving various challenges in healthcare*

The Holy Grail: Influencing Consumer Behavior

Cory Kidd – CEO, Catalia Health

- Obesity and medication non-adherence cost us 300,000 deaths and ~\$300 billion every year. Both ‘epidemics’ can be prevented by influencing consumer behavior. But how? Healthcare, with its long-overdue-for-a-change one-size-fits-all approach, has had lackluster results. Design thinking, the foundation upon which companies like IDEO have been built, has the potential to transform that. Come join a discussion about winning the hearts and minds of consumers and achieving a lasting impact.

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Wednesday, November 7, 2018 (continued)

“DEEP DIVE” DISCUSSIONS (CONTINUED)

- 9:45 - 10:45 AM *Exchange ideas and challenge assumptions through an open dialogue with industry peers who share a common passion for solving various challenges in healthcare*
- Fighting the Opioid Epidemic: What is the Path Forward?**
Daniela Luzi Tudor – CEO, WEconnect Recovery
- 115 people in the US die from an opioid overdose every day. The system has effectively launched initiatives to curb prescriptions and inform providers, but what are we doing for the consumer? What can consumer-facing companies do to create comprehensive solutions and how can those be integrated?
- Payer-Provider Partnerships: Easier Said than Done**
Brigitte Nettesheim – President, Joint Venture Markets, Aetna
- Much of the success of payer-provider partnerships depends on the ability to create a differentiated consumer experience. Yet, while straightforward in theory, a differentiated product requires technical, timing, and cultural coordination across entities. In this session we'll address some of those challenges and lay out successful (and not-so-successful) examples for building an impactful consumer experience.
- I (Really) Need a Vacation: Addressing a Burnt Out Workforce**
Logan Sugarman – Chief Business Officer, Thrive Global
- Burnout is not limited to physicians - job burnout costs the US healthcare system over \$120 billion. In parallel, increasingly strenuous jobs for healthcare workers across the spectrum can sometimes result in a less engaged, less healthy, less and motivated workforce - sacrificing quality and bottom line with it. In this session we'll focus on measures providers, payers, and other healthcare constituents can take to address the growing burnout problem.
- Healthcare Data Liberation: How Can We Participate?**
Aneesh Chopra – President, CareJourney, Former US Chief Technology Officer
- MyHealthEData, Blue Button 2.0, new EHR incentive programs, and a health IT industry convergence on emerging internet standards are paving the way for interoperability. The benefits are clear, but what more needs to be done so we might realize the potential for our IT integration needs? How might we better collaborate to address some of the current technical and non-technical challenges in the system? What role are the different healthcare constituents playing in participating, advancing this movement, and, most importantly, operationalizing it?
- If You Build It, They Will Come ... Right?**
Jeff Bennett – CEO, high5
- The advice that so perfectly worked in 'Field of Dreams' is infamous in healthcare. In no area is this as evident as in the New Front Door of healthcare. As retailers, employers, health plans, new entrants, and health systems alike compete for a consumer's first touchpoint, we are faced with a myriad of solutions that, while increasing in popularity, have yet to gain massive traction. How can we get folks knocking?

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MAIN STAGE SESSIONS

11:00 - 12:00 PM **You Try Running a Hospital**

Barclay E. Berdan – CEO, Texas Health Resources; LaVone Arthur – Chief Strategy Officer, Baylor Scott & White Health; W. Stephen Love – President & CEO, Dallas-Fort Worth Hospital Council; Wright L. Lassiter III – President & CEO, Henry Ford Health System

- Yogi Berra once said, “If you don’t know where you are going, you’ll end up someplace else.” Collectively, US hospitals face expenses that are growing faster than revenues, declining credit ratings, and government as their biggest customer. What does the evolution of healthcare that we’ve been discussing mean for their plans? What are hospital leaders’ biggest hopes – and fears?

What’s Next?

Brigitte Nettesheim – President, Joint Venture Markets, Aetna; Niyum Gandhi – EVP and Chief Population Health Officer, Mount Sinai Health System; Reena Pande, MD – Chief Medical Officer, AbleTo

- For the Summit to have any impact, our conversations here must become actionable when we all go back to our organizations. In this free-wheeling conversation, Oliver Wyman’s Sam Glick will be joined by some of the Summit’s most interesting and provocative attendees to break down what’s real, what’s a pipe dream, and where we go from here. You don’t want to miss it.

CLOSING LUNCH

12:15 - 1:00 PM *Reflect upon the Summit experience over a final lunch with fellow executives*