

AGENDA

MONDAY, NOVEMBER 6, 2017

REGISTRATION

12:00-7:00pm The Fairmont Dallas | 1717 N. Akard Street | Dallas, TX | 75201

IMMERSION TOURS

1:30-4:30pm *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*

- **Catapult Health:** Incredibly convenient preventive care at the workplace, integrated with live provider consultations, employer wellness programs, and primary care physicians
- **UT Southwestern Medical Center:** Built consumer-centric by extracting the 'best-of' from the entertainment, consumer products, hospitality and transportation industries – resulting in a vastly different customer experience and a highly agile infrastructure
- **Children's Health:** Breaking down barriers to access life saving care delivery from hundreds of miles away – through integration of virtual health in day-to-day operations
- **Center for BrainHealth:** Brain health for the population – to nurture good health, more effectively treat disease, and enhance productivity – through multiple mechanisms, from mindfulness to virtual reality

WELCOME MIXER

5:30-7:00pm *Kick off the Summit while networking with fellow senior healthcare industry leaders over cocktails and hors d'oeuvres*

DINNER RECEPTION

7:00-9:00pm *Keep the conversation going over a sit-down dinner – and take a moment to enjoy a lively conversation between Marilyn and David as Lauren probes for their thoughts on innovation, overcoming competitive challenges, and navigating the regulatory landscape*

- **Marilyn Tavenner** – President & CEO, AHIP
- **David L. Holmberg** – President & CEO, Highmark Health; Chairman of the Board, Highmark Inc.
- **Lauren Silverman** – Health, Science, & Tech Reporter, KERA News; Former Reporter, NPR

AGENDA

TUESDAY, NOVEMBER 7, 2017

WELLNESS WAKE-UP

6:00-7:00am *Start your day with an energetic boot camp session. The pace of the class is designed to include all levels of fitness with a variety of modifications. Any required equipment will be provided.*

BREAKFAST

7:15-8:15am *Reconnect with old friends and make new ones over a healthy meal*

MAIN STAGE SESSIONS

8:15-10:45am

Industry Interrupted: Why Healthcare is Ripe for Disruption

Helen Leis – Partner, Health & Life Sciences Practice, Oliver Wyman

- For years, we have predicted that healthcare is on the cusp of being disrupted and revolutionized by technology. But despite the hype and investment in innovation, little change has occurred. We still access care in the same ways. We are still frustrated by the lack of integration and coordination across the system. So where is our promised revolution? How will transformative disruption actually occur in healthcare?

(Consumer Finance) Industry Interrupted: What Can We Learn?

Nigel Morris – Managing Partner, QED Investors; Co-Founder, Capital One

- In an industry renowned for legacy incumbents and lagging innovation, Capital One increased its market cap by 2,000% over 10 years. How did their novel approach to understanding the consumer help them get there? What challenges did they face in maintaining a competitive edge?

Aging Disrupted: Creating a New Reality Through Innovation

Jo Ann Jenkins – CEO, AARP

- We are at a unique time in our history where the aging of society is coinciding with innovations in biomedical research, genomics, health, and technology. The convergence of these trends is disrupting aging in unimaginable ways, and allowing us to choose how we want to live and age. For organizations ready to challenge outdated beliefs and stereotypical views about aging, this phenomenon is creating an unprecedented market opportunity.

EXECUTIVE SESSIONS

11:00-12:00pm

Learn, share, connect, and discuss what it takes to reinvent the health market (session speakers listed on the following pages for each topic)

- Looking Beyond the Persona: Knowing What Consumers *Really* Want
- Breakthrough Affordability: The Potential Avenues to Radical Change
- The Cost of the Cure: Defining “Value” in Pharma
- Driving Success: Building a Disruption-Ready Org

LUNCH

12:00-2:00pm

Grab some lunch, network, and discuss the morning sessions

AGENDA

TUESDAY, NOVEMBER 7, 2017 (CONTINUED)

MEET DAWN: THE CUSTOMER OF THE FUTURE

12:00-2:00pm

She doesn't know how to drive, but she drives all the time. She's always shopping, but she's never standing in line. She's never once been "lost." Her T-shirt is connected to the internet. Her manager is a robot. Meet Dawn: an average 25-year-old in the not-so-distant future. Dawn will "come to life" through an immersive exhibition where we will take you on a journey, exploring the major shifts shaping how people connect, create, escape, work, unwind, get well and simply live. Get ready to meet the customer of the future.

EXECUTIVE SESSIONS

2:00-3:00pm

Learn, share, connect, and discuss what it takes to reinvent the health market (session speakers listed on the following pages for each topic)

- Finding Harmony: The Challenge of Marrying High Touch and High Reach
- Distribution Disruption: Who Will Control the Future Trading Flow?
- Inside Out Innovation: Incumbents Taking Charge
- Artificial Intelligence Meets Healthcare: Inside the AI Revolution

MAIN STAGE SESSIONS

3:15-5:00pm

Cutting Through The Noise: What's Really Next For Healthcare?

Thomas Goetz – Co-Founder, Iodine, Former Executive Editor, WIRED; Lisa Suennen – Senior Managing Director, GE Ventures; Krishna Yeshwant, MD – Partner, GV (formerly Google Ventures)

- Last year, nearly \$8 billion was invested in digital health start-ups and 98% of them failed. With everyone focused on innovation, are we seeing innovative breakthroughs or just incremental changes? Are we changing for the sake of changing or are we pushing for real transformation?

Paging Dr. Robot: Artificial Intelligence and the New Workforce

Chris Nicholson – Founder & CEO, SkyMind

- Artificial intelligence is expected to replace 50% of jobs in the next decade. Will a robot be performing your (or your relative's) surgery in the next couple of years? What is possible with AI and how will that evolve over the next 10-15 years? How will AI impact healthcare – now and going forward?

How Can We Segment and Still Serve Our Mission?

Sarah Krevans – President & CEO, Sutter Health

- More than 80% of hospital beds in the US are operated by not-for-profit organizations or the government. These institutions exist to ensure access to care for everyone in their communities – despite massive cross-subsidy economics. Successful consumer businesses outside of healthcare start by choosing their customers carefully and tailoring the product accordingly. How can a community health system learn from such approaches while still serving its mission?

SOUTHERN SOIREE

6:00-7:30pm

Round out the day over drinks, appetizers, and a game of corn hole

AGENDA

WEDNESDAY, NOVEMBER 8, 2017

PRACTICING WISELY

7:00-8:00am

Solving the \$200BN Problem: Reducing Inappropriate Care with Transparency

Learn how the simple approach of showing physicians how their practice compares to that of their peers can lead to a meaningful reduction in inappropriate care

BREAKFAST

7:15-8:15am

Enjoy breakfast over a casual chat with new friends, or join a conversation on how the Customer of the Future will impact healthcare

MAIN STAGE SESSIONS

8:15-9:30am

What Got Us Here Won't Get Us There: The Clinicians We Need Now

Stephen K. Klasko, MD, MBA – President & CEO, Thomas Jefferson University and Jefferson Health

- As the world produces rapid-fire innovation in search of medical progress, the role of a clinician continues to evolve. There's a different skillset required to deliver on the combined roles of medical expert, customer service specialist, and tech-savvy clinician. Is the merger between a medical school and a design school indicative of an upcoming reinvention of an age-old process to create successful physicians?

Delivering on the Promise of 21st-Century Data to Benefit Patients

Paul B. Rothman, MD – Dean of School of Medicine & CEO, Hopkins Medicine

- Data science offers untold potential to improve human health. In the future, doctors will partner with engineers and informatics experts in helping make nearly every decision in the clinical environment. The line will blur between scientific learning and clinical practice. How do we seize the opportunities, and overcome the sizable challenges, surrounding big data as applied to medicine?

"DEEP DIVE" DISCUSSIONS

9:45-10:45am

Exchange ideas and collaboratively build toward solutions through an open dialogue with industry peers who share a common passion for solving various challenges in healthcare

- From Bricks to Clicks: Achieving Engagement at Scale
- Outcomes-Based Contracting: Success vs. Failure
- More Power to the Caregiver: If and How to Make It Happen
- Behavioral Health: We Know It's Critical, Now What?
- Amazon and Whole Foods: Nutrition at Your Doorstep



AGENDA

WEDNESDAY, NOVEMBER 8, 2017 (CONTINUED)

MAIN STAGE SESSIONS

11:00-12:15pm

Market Makers (or Market Shakers?): A Chat on How the Ecosystem Will Evolve

Chris Cigarran – CEO, Imagine Health; Debra A. Gold – Senior Vice President, Quantum Health

- Despite legacy incumbents dominating the health plan ecosystem, new entrants have emerged. Quantum Health’s consumer-focused approach earns them an NPS of +73 in an industry where single digits are the norm. Through its curated networks, Imagine Health increases the quality of care while delivering >10% savings to Fortune 100 employers. What’s the value proposition driving each organization’s success? What’s their view on the role of the health plan, now and going forward?

Looking Back to Look Ahead: Where Do We Go From Here?

Niyum Gandhi – Executive Vice President & Chief Population Health Officer, Mount Sinai Health System; Todd VanTol – Senior Vice President of Health Plan Business, BCBS of Michigan; Michael Weissel – Group Executive Vice President, Optum

- “Action always beats intention.” React and reflect on 2.5 days of predictions, innovations, experiences and provocative dialogue. What initiatives will be inspired by what we’ve learned? What does the future hold for the healthcare industry and consumers?

CLOSING LUNCH

12:15-1:00pm

Reflect upon the Summit experience over a final lunch, or grab a packed lunch if you need to hit the road

EXECUTIVE SESSIONS

The following Executive Sessions will be held in the morning of Tuesday, November 7, from 11:00am to 12:00pm. They will be on a first come, first serve basis until capacity constraints are reached.

BREAKTHROUGH AFFORDABILITY: THE POTENTIAL AVENUES TO RADICAL CHANGE

- Brandon Ballinger – Cardiogram; Charles Boorady – Health Catalyst Capital Management LLC; Tony Wang – Color
 - Affordability has been a longstanding hot topic in healthcare. Nonetheless, costs continue to rise - on every measure. Population health and value-based models offer a slow-to-come promise. The demand for care remains excessive; the costs to supply care stay prohibitive. This session combats affordability from the demand side and the supply side: Will Precision Medicine and AI dramatically reduce demand - thus justifying their costs? Will digitization and automation replicate their transformative impact on productivity in healthcare - radically lowering delivery costs without overcomplicating IT systems? Which side will take the driver's seat to lead us to truly affordable care?

DRIVING SUCCESS: BUILDING A DISRUPTION-READY ORG

- Marco Annunziata – GE; Rich Roth – Dignity Health
 - The healthcare industry is struggling to adapt to a world rampant with advanced technologies and innovations. Companies need to evolve to survive the disruptions and to reap the benefits of these advancements. What structures, mindset, and behaviors, do incumbents need to reinvent themselves to be "disruption-ready"? What are the distinctive characteristics of organizations that are prepared to embrace innovations and have the agility and flexibility to react to changes quickly? This session presents an out-of-industry enterprise that has successfully reinvented itself, and explores what a healthcare business needs to do to replicate the same success.

LOOKING BEYOND THE PERSONA: KNOWING WHAT CONSUMERS REALLY WANT

- Jay Gerhart – Carolinas Healthcare System; Bob Moesta – The Re-Wired Group
 - Critical to the success of consumer-focused offerings is their ability to effectively address consumers' underlying needs: what they're ultimately trying to accomplish through the purchase. For decades, we've relied upon demographic 'stats' to improve offerings - but does this mechanism, which by definition stereotypes individuals based on superficial traits, help uncover why consumers make the decisions they make? This session examines how the underlying causes of consumer behavior impact the propensity to buy through one of the most prominent theories of causality – Jobs to be Done – and explores how this understanding informs better products that drive an enhanced consumer experience.

THE COST OF THE CURE: DEFINING “VALUE” IN PHARMA

- Young Fried – HealthPartners; Lee Newcomer – UnitedHealthcare; Alex Turkeltaub – Roam Analytics
 - If there's one thing people can agree on around how a drug is valued, it's that no two stakeholders agree on how best to approach it. Healthcare is rapidly shifting to value; specialized medicine is delivering remarkable new therapies; and dissatisfaction around drug prices is growing. It is more imperative now than ever before for each stakeholder – including health plans, pharma, government, providers, innovators, employers – to understand each other's perspectives. This session will explore the rationale behind multiple stakeholders' approaches to value – and kick-start a discussion aimed to develop a shared definition of value.

EXECUTIVE SESSIONS

The following Executive Sessions will be held in the afternoon of Tuesday, November 7, from 2:00pm to 3:00pm. They will be on a first come, first serve basis until capacity constraints are reached.

ARTIFICIAL INTELLIGENCE MEETS HEALTHCARE: INSIDE THE AI REVOLUTION

- Jared Josleyn – Verily Life Sciences; Daniel Nathrath – Ada Health
 - In industries ranging from manufacturing to automotive, and video gaming to financial services, Artificial Intelligence is increasing accuracy and efficiency while improving consumer experience. What about health? Is there a future where patients prefer getting advice from a robot over their PCP? How close are we to perfect diagnoses? This session examines AI's role in the healthcare industry - from prevention to intervention, from machine learning to patient facing - and questions how futuristic AI really is.

DISTRIBUTION DISRUPTION: WHO WILL CONTROL THE FUTURE TRADING FLOW?

- Veer Gidwaney – Maxwell Health; Jason Hover – BCBS Michigan; Steven Wilkinson – Serta Simmons Bedding
 - The distribution landscape has seen significant proliferation in recent years, from private exchanges and PEOs, to consumer-direct platforms and brick and mortar retail. But the traditional, well-calibrated B2B broker/consultant model still dominates the industry's trading flow. How close are we to the tipping point of a distribution disruption where the focus shifts to employee experience? What B2B2C value proposition needs to be in place, what needs should be met, and what technical requirements are necessary, in order to create a seismic shift? Who will control the customer experience in the future? This session will address these questions from the voices of the employer, stakeholders in the traditional model, and the new digital distribution players.

FINDING HARMONY: THE CHALLENGE OF MARRYING HIGH TOUCH AND HIGH REACH

- Gaurov Dayal – ChenMed; John Kao – Alignment Healthcare; Jeff Margolis – Welltok
 - 'High-tech' models use digital technology to reach and engage with millions. 'High-touch' models leverage human interactions to create high-trust relationships and incredible impact. Does each model have its own universe? How do you take the capabilities of each of these models and make them relevant and impactful in the other? The session will tackle a major tension in healthcare: Can the industry deliver far greater impact by leveraging the 'best of' across the spectrum to develop a scalable model that drives the best outcomes?

INSIDE OUT INNOVATION: INCUMBENTS TAKING CHARGE

- Busy Burr – Humana; Nick Reddy – Baylor Scott & White Health
 - Many innovative start-ups have entered the healthcare industry in recent years, claiming to be the driving force behind more affordable and more effective healthcare. What are the incumbents doing to retain their impact? How are they leveraging technology to deliver more affordable care, create better consumer experience, and ultimately enable better outcomes? This session takes you through the journeys of two legacy players – and discovers how they took matters into their own hands to tackle the industry's biggest problems.



DEEP DIVE SESSIONS

The following Deep Dive Sessions will be held in the morning of Wednesday, November 8, from 9:45am to 10:45am. They will be on a first come, first serve basis until capacity constraints are reached.

FROM BRICKS TO CLICKS: ACHIEVING ENGAGEMENT AT SCALE

- Harry Leider – Walgreens
 - We've seen high touch bricks and mortar approaches drive engagement from thousands; how can digitization enable us to engage millions?

OUTCOMES-BASED CONTRACTING: SUCCESS VS. FAILURE

- Sean Duffy – Omada Health
 - Outcomes-based contracting has always been a challenge, making its influence in certain sectors of the healthcare industry slower than others. How can these challenges be overcome and what value have players seen in their own experiences?

MORE POWER TO THE CAREGIVER: IF AND HOW TO MAKE IT HAPPEN

- Jennifer Schneider – Livongo Health
 - Home and community-based caregivers often spend the most time with healthcare consumers, yet are fragmented from care delivery teams. What barriers stand in the way of empowering caregivers and how can we overcome them to deliver better consumer health?

BEHAVIORAL HEALTH: WE KNOW IT'S CRITICAL, NOW WHAT?

- Rob Rebak – AbleTo
 - Behavioral health is moving to the top of every strategic agenda with investment dollars flowing into the space. But what will it take to assemble a solution set to this multi-faceted problem? How do we meet the range of needs of this population, while leveraging the full set of interventions and treatments that are becoming available?

AMAZON AND WHOLE FOODS: NUTRITION AT YOUR DOORSTEP

- Jason Langheier – Zipongo; Alison Steiber – Academy of Nutrition and Dietetics
 - Amazon + Whole Foods, CVS + Aetna? Food is medicine – and these imminent leaps into healthcare signal just that. Has nutrition been enough of a priority for legacy healthcare players? How can we release its untapped potential by bringing pharmacy and Food Benefits Management together?