

2019 OLIVER WYMAN HEALTH INNOVATION SUMMIT

AGENDA — September 2019

16

Monday

WELCOME

11:00 AM – 7:00 PM Stop by the Loews Lobby (The Loews Chicago | 455 N Park Dr. | Chicago, IL | 60611)

INSPIRATION TOURS

1:30 PM – 4:30 PM *Explore how the Chicago area's most innovative organizations are transforming the health market through on-site, interactive tours. Advanced registration is required.*

Making Connections, Smarter: Performance Through Personality

At Mattersight; meet outside the lobby, near the Wright Foyer windows

What makes a magical personal connection? A magical personality connection. Explore how personality analytics creates better customer experiences that streamline performance. Take your own assessment to learn how custom connections can unlock your business's potential.

Work Differently: Creating an Innovation Mindset

At Salesforce Ignite; meet outside, near the hotel entrance

Stop trying to manage your inbox and wasting time in yet another meeting. Instead, experience how Ignite's entrepreneurial innovation team uses design thinking, collaboration, and behavioral methodology to end time-consuming "business as usual" habits that have us stuck on autopilot.

Advancing Human Ability: Integrating Innovation and Delivery

At Shirley Ryan AbilityLab; meet in the lobby, by the fireplace

This top rehabilitation destination for patients with traumatic injuries is the only setting where physicians and scientists work together in the same space to deliver care while developing future cures. Here, cutting-edge research is translated and applied in real time, redefining patient recovery.

Designing for Shared Value: Good Behavior, Good Economics

At Vitality/Apple; meet in the lobby, near the ETA Restaurant entrance

What if healthy habits were second nature? Vitality proves design delivers lasting behavior change. And, Apple understands a customer journey begins long before buying and does not end with a purchase. Join Vitality at the architecturally renowned Michigan Avenue Apple Store to learn how design fosters engagement and lasting customer relationships.

WELCOME MIXER

6:00 PM – 7:00 PM *Kick off the Summit with fellow senior health industry leaders over cocktails and hors d'oeuvres.*

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DINNER RECEPTION AND KEYNOTE SPEAKER

7:00 PM – 8:30 PM

Keep the conversation going over a sit-down dinner – and take a moment to enjoy a dynamic conversation about diversity in leadership.

Now Showing: The HER STORY Alliance

Most of the greatest historical breakthroughs came from people you've probably never heard of. And from women you've never heard of. This exclusive preview – representing the launch of The HER STORY Alliance series – highlights how women have shaped healthcare and medicine.

The Rest is HER STORY: A Conversation with the Producer

Jill Tietjen – President, American HerStory; Terry Stone – Managing Partner and Global Chair for Inclusion & Diversity, Oliver Wyman

As one of the University of Virginia's first female engineering graduates, and Colorado Hall of Fame inductee, Jill has a story that underscores the importance of diverse perspective – and heartfelt passion for progress—in high-impact leadership. Hear how Jill is rewriting the history books, and how a diversity-oriented mindset keeps organizations on the leading edge of innovation.

DESSERT SOCIAL

8:30 PM – 10:00 PM

Mix, mingle, and satisfy your sweet tooth.

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WELLNESS WAKEUP YOGA

6:30 AM – 7:15 AM *Kickstart the day with rooftop yoga at sunrise!*

BREAKFAST

7:00 AM – 8:00 AM *Reconnect with old friends and make new ones over a healthy breakfast.*

TABLE TALK

7:30 AM – 7:50 AM *Join a more intimate Q&A with Jill Tietjen in a small group setting (space is limited).*

MAIN STAGE SESSIONS

8:00 AM – 9:50 AM

Puttin' on the Ritz: Creating a Culture of Service

Horst Schulze – Co-Founder and Former Chief Operating Officer, Ritz-Carlton

Nearly 40 years ago, Horst Schulze took a storied, but languishing brand, and built the world's perhaps best-known luxury hotel chain. By investing first in people and culture – “ladies and gentlemen serving ladies and gentlemen” – Horst created a service experience that was second to none. Yet service was only half the story. Along the way, Ritz-Carlton won two Malcom Baldrige National Quality Awards and trained over 50,000 executives across industries, and Horst turned his attention to healthcare by joining the board of ChenMed. We'll learn from Horst how to create the delightful healthcare experiences that consumers deserve.

Designing with Empathy: The Practice of the Future

Chris Waugh – Chief Innovation Officer, Sutter Health

When asked what weekday healthcare represents, many patients say “Monday,” or worse, “Monday, after a three-day weekend.” With consumers viewing healthcare services with such dread, how can we create exceptional experiences? Applying cutting-edge approaches to design thinking, Chris helped create a “Practice of the Future” that meets patients where they are. He's helped make measurable strides towards a healthcare that's “simpler, more engaging, more human, and more affordable”.

Your Next Employee Won't Have a Resume

Sean Lane – Co-Founder and Chief Executive Officer, Olive

The World Economic Forum predicts that by 2025, machines will perform over half of human workers' tasks. Will chatbots run the world? Is artificial intelligence the next big thing, or just the next big money pit? A former National Security Agency operative, Sean Lane is optimistic. Implemented appropriately, AI lets humans become more human, focusing on creative, collaborative, and meaningful work. But how do we use AI wisely, not wastefully?

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EXECUTIVE SESSIONS

10:00 AM – 11:00 AM *Participate in a focused session to learn, share, connect, and discuss what it takes to build impact in the health ecosystem.*

Body, Meet Mind: Care Models That Put Us Back Together

Brenda Reiss-Brennan, PhD – Chief Clinical Officer, Alluceo; Carolyn Jasik, MD – Chief Medical Officer, Omada Health; Paul Ciechanowski, MD, MPH – Chief Medical Officer, Samepage Health

The industry recognizes the positive impact of diagnosing and treating mental health conditions appropriately — and, the consequences when they're not. For patients, seeking routine medical care, it can be a disjointed, overwhelming experience, and underlying behavioral health problems can dramatically exacerbate illness and care costs. But new models that integrate behavioral health treatment into care models are driving meaningful care outcomes and creating differentiated value.

The Medicare Advantage... Advantage: Winning in the Next Generation of MA

John Kao – Chief Executive Officer, Alignment Healthcare; Julie Smith – Former President of Government Business, Anthem and Blue Cross Blue Shield of Michigan, Senior Adviser, Oliver Wyman; Vivek Garipalli – Co-Founder and Chief Executive Officer, Clover Health

By 2030, 20 percent of the US population will be over 65. With more aging Boomers buying Medicare Advantage, they represent the biggest, most lucrative growth segment. For years, CMS has spearheaded most MA innovation. We go beyond the brass tacks of Stars and Risk Adjustment to discuss MA's next generation. Hear an in-depth conversation with leaders using different models to support tomorrow's MA needs.

Information Overload: Harnessing Consumer Data to Drive Impact

Jana Perry – Vice President of Strategy and Marketing, Health Alliance; Jeff Margolis – Chairman and Chief Executive Officer, Welltok; Kurt Waltenbaugh – Founder and Chief Executive Officer, Carrot Health

Only 15 percent of what we know about consumers resides within the healthcare ecosystem -- and many posit the other 85 percent more heavily impacts care decisions. The amount of consumer information is rapidly growing, leaving big value on the table. How do you overcome complex barriers, combine data sources, and harness data's power in an action-oriented way? We'll break down data into use cases, and dive into case studies where organizations harness consumer and healthcare data to impact consumer behavior, engagement, and outcomes.

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MINDSETS & MOLECULES: THE ART AND SCIENCE OF BEHAVIOR CHANGE AN EXPERIENTIAL WORKSHOP

10:00 AM – 11:00 AM This curated, interactive workshop explores the art and science behind impacting human behavior and activating organizations to achieve more. We'll dive into the neuro- and behavioral factors that influence big and small dynamics and how practical, human-centric wisdom helps change stick and new patterns emerge.

Learn how to apply an arsenal of practical tools, tips, and ways to overcome behavior change challenges that hinder healthcare's growth and transformation.

LUNCH AND FOCUSED SESSIONS

11:15 AM – 1:15 PM *Grab some lunch, network, discuss the morning sessions – and be sure to check out one of the concurrent sessions or activities!*

11:30 AM – 12:30 PM

Bait Me: Innovation that Hooks

A *Shark Tank*-inspired showcase of healthcare organizations who are creating impact today in creative and unexpected ways. Witness passionate innovator pitches and questions from "sharks" who represent the toughest of critics within the ecosystem. Afterwards, connect with the innovators themselves in a more intimate setting.

12:15 PM – 1:15 PM

Chicago Riverwalk: A Walking Tour on the Making of a City

Get out of your seats and into the heart of the skyline with this architectural tour led by Chicago Architecture Center experts. See historic and iconic landmarks, and learn their connection to history and design.

12:15 PM – 1:15 PM

Bridging Borders: Growing into International Markets

What opportunities lie beyond North America? Broaden your horizons, and discuss the lessons learned from innovators who have ventured to expand internationally.

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EXECUTIVE SESSIONS AND MINDSETS & MOLECULES EXPERIENTIAL WORKSHOP

1:30 PM – 2:30 PM

Mindsets & Molecules: The Art and Science of Behavior Change

See description on page 5

Executive Sessions:

Digital Treatment and Diagnostics: Expanding the Healthcare Delivery Toolkit

David Benshoof Klein – Executive Chairman, President and Chief Executive Officer, Click Therapeutics; Laura Yecies – Chief Executive Officer, SyncThink; Trip Hofer – Chief Executive Officer, AbleTo

The digital therapeutics space is using technology to redefine how care is provided. As the supply of digital therapeutics expands — thanks to innovators — what is the practical application and adoption of digital therapeutics? We will contextualize digital therapeutics' role and implications on the healthcare ecosystem.

Mind the Gap: A Collaborative Approach to Addressing Inequity

Pamela Roesch – Director of Health Equity and Assessment Research, Sinai Urban Health Institute; Angela Taylor – Health and Wellness Coordinator, Garfield Park Community Council and West Side United Community Advisory Council Member; Mary Kate Daly – Executive Director, Lurie Children's Healthy Communities, Ann & Robert H. Lurie Children's Hospital of Chicago; Ayesha Jaco – Executive Director, West Side United; Marcus Betts – Assistant Vice Chancellor for External Engagement, University of Illinois at Chicago

Less than 20 percent of health outcomes are driven by care delivery. The rest? By circumstances surrounding how we live. Improving patients' health long-term by taking lifestyle factors into consideration means facing insurmountable barriers. Hear how West Side United, a partnership of health systems, businesses, and government, tackles social determinants in Chicago. Learn how they're improving education, housing, economic opportunities, and health and what results they've seen thus far.

Holy Shift! Moving to Value, at Scale

Gaurov Dayal, MD – President of New Markets and Chief Growth Officer, ChenMed; Michael Krouse – Senior Vice President and Chief Transformation Officer, OhioHealth; Renee' Buckingham – President of Care Delivery Organization, Humana; Shawn Morris – Chief Executive Officer, Privia Health

The most critical value-based care component is the primary care physician. But moving primary care to value, at scale, still presents significant challenges. We'll explore various models aiming to deliver value at scale and the key components contributing to their success.

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Tuesday

DEEP DIVE DISCUSSIONS

2:45 PM – 3:45 PM

Exchange ideas and challenge assumptions through an open dialogue with industry peers who share a common passion for solving various challenges in healthcare. Session sizes are capped, so select one and plan to arrive early to ensure a seat!

Bump Up the NPS: An Employee-First Approach to Consumer Experience

Chris Chen, MD – Chief Executive Officer, ChenMed; Horst Schulze – Co-Founder and Former Chief Operating Officer, Ritz-Carlton

Ritz-Carlton's brand is well-known for its seamless consumer experience and deep customer loyalty. The driver of that success? A focus on the internal work force. How do you bring this employee-first approach to healthcare? Hear common challenges and successes and learn how ChenMed is embedding Ritz-Carlton's model into their own organization.

Interoperability: Driving Adoption and Impact

Aneesh Chopra – President, CareJourney

True interoperability requires standards, adoption, and application. Given the success we've seen with Argonaut and now other FHIR 'accelerators', such as CARIN and DaVinci, we have a growing number of consensus-driven implementation guides that accelerate our progress. As 2020 approaches, payers, providers, cloud platforms, HER vendors, and other stakeholders have the opportunity to collaborate at lower cost and advance data access, portability, and impact.

An Apple a Day: Building a Sustainable Strategy around Nutrition

Trenor Williams, MD – Founder and Chief Executive Officer, Socially Determined

As the 'food as medicine' movement picks up steam, organizations are migrating from small pilots geared towards improving health to creating longer term sustainable impact across critical patient and member segments. Making nutrition initiatives a standard part of the healthcare delivery toolkit requires a complementary, sustainable business model. How do we effectively identify the right patients or members that will, if delivered the right intervention models, create the most tangible outcomes? And how do we measure the clinical and financial ROI? Through a discussion on successful, in-market models and analogous initiatives, we'll identify how to build a business strategy that consistently delivers.

Additional Deep Dive Discussions on following page

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DEEP DIVE DISCUSSIONS (CONTINUED)

2:45 PM – 3:45 PM

Physician Performance Measurement: The Key to Value, Guidance, and Improvement

Jeanne Cohen – Founder and Chief Executive Officer, Motive Medical Intelligence

“If You Can’t Measure It, You Can’t Improve It.” To improve healthcare requires that we measure the things that matter. “Provider profiling” is a big effort among health plans and “Physician Performance Improvement” is a hot trend among provider organizations as they move to value. The key challenge is finding the measures that matter... those that are tied to evidence-based medicine, correlate with cost savings, spur behavior change, and allow members / patients to receive better care. In this session, we’ll have an open discussion on current measurement approaches, the landscape of players in this space, and explore ways that organizations can use measures to (1) drive physician behavior change to support value-based care, and (2) direct members / patients to the right physician for their needs.

The Impact Journey: Tackling the Challenges of Transformation

Carter Dredge – Chief Transformation Officer, SSM Health

Transformations are hard. Stakes are high and the pace intense. Managing the myriad of stakeholder groups, entities, and cultures is an incredible feat. We’ll unpack these complexities alongside SSM Health, an organization redefining health. Last year, they launched a health plan, entered multiple joint ventures with innovative partners, and began shifting towards value-based contracts. Share your challenges and successes, and learn how SSM’s managed partnerships, cross-stakeholder initiatives, and change.

What Workers Want: Delivering the Right Digital Tools in the Right Way

Kate Brown – Leader, Center for Health Innovation, Mercer

In 2020, the Mercer Connected Health Survey – one of the most comprehensive and global cross-segment health surveys – will release results on employer and consumer digital health views. How will consumers feel about privacy and sharing data? How will employers prioritize digital health? What are consumers willing to try with digital health? Where are employers and employees misaligned? We’ll discuss answers to these questions by looking into early survey findings.

AI-m for the Stars: The Today and Tomorrow of Artificial Intelligence

David Waller – Head of Data Science and Analytics, Oliver Wyman Labs

We’ve anticipated for years that artificial intelligence may one day shift how we think about health - but the change so far has been incremental. Bust some myths and share lessons from in- and out- of industry to explore AI’s untapped potential in healthcare.

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MAIN STAGE SESSIONS

4:00 PM – 5:00 PM

This Time Really is Different: Our Innovation Inflection Point

Jorge Conde – General Partner, Andreessen Horowitz

There are plenty of reasons to be pessimistic about healthcare. Costs keep rising, we keep having the same debates, and, for the first time in more than a century, the average lifespan in the US has declined each of the past three years. Yet we're also experiencing an unprecedented era of innovation around health. From progress in engineering biological systems, to software "eating" care delivery, we're now at an innovation inflection point. Venture capitalist, Jorge Conde, is betting that the health system of 2040 will be virtually unrecognizable from the system we know today. If he's right, how do we start getting ready now?

The Encounter is Dead! Long Live the Encounter!

Jennifer Schneider, MD, MS – President, Livongo; Jesse Ehrenfeld, MD, MPH – Chair, Board of Trustees, American Medical Association

New patient appointment. Follow-up appointment. Wellness visit. Test. Procedure. Encounter, encounter, encounter. For all of the changes we've seen in the healthcare system, for most physicians, the practice of medicine is still episodic, discrete, and reliant on patient "pull." We know this model leads to patient dissatisfaction and physician burnout. New technology can fundamentally change the way we monitor, treat, and engage with individuals. How do we make this switch happen – and how can we help physicians, and their profession at its core, be part of the solution?

EVENING COCKTAILS

6:00 PM – 7:30 PM

Round out the day over drinks and appetizers on the rooftop – at our very own Chicago World's Fair!

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Wednesday

BREAKFAST

7:00 AM – 8:00 AM *Reconnect with old friends and make new ones over a healthy breakfast – and join a Table Talk to discuss Tuesday’s highlights!*

TABLE TALK

7:30 AM – 7:50 AM *Join a more intimate Q&A with Chris Waugh in a small group setting (space is limited).*

MAIN STAGE SESSIONS

8:00 AM – 9:30 AM *Featured speakers include:*

It’s Time to Drive Impact

Josh Michelson – Partner and Co-Director of the Health Innovation Center, Oliver Wyman

Healthcare transformation. What so much energy and so many initiatives have focused on over the past decade in the US. Every sector has experimented with innovative models that promise an improved industry outlook. The innovation economy has funded hundreds of businesses attempting to redefine healthcare’s status quo. And many incumbents realize traditional business models are no longer compatible with demographic realities, consumer needs, and – holding up a mirror – company mission. Stepping back, we see a healthcare industry saturated with breakthrough solutions – but have we really succeeded in moving the needle on impact?

We’re from the Government, and We’re Here to Help. Really.

Sarah Iselin – Executive Vice President of Government Programs and Diversified Business, Florida Blue

From ERISA to the ACA, and from value-based care to Medicare Advantage, more often than not, when a step change happens in our industry, the government is responsible. Yet too often healthcare leaders view government simply as “the regulator” or “the biggest payer” – a force to be managed rather than embraced. Sarah Iselin has built a career taking a different view, treating government as a partner and making real innovation happen as a result. How could the system be different if we all took Sarah’s approach?

Buckle Up: Embracing Transformation Head On

Janice Nevin, MD, MPH – President and Chief Executive Officer, Christiana Care Health System

Transformation is hard in any organization. Community health systems, however, are in a league of their own. Longstanding cultures, community pressures, and commitments to shared governance far too often turn best-laid plans from transformational to ploddingly incremental. As CEO of Christiana Care, Janice Nevin didn’t let these typical obstacles stand in her way as she pivoted her system to value while improving quality, customer satisfaction, and leadership diversity. How did she do it? And what can we learn about what to do – and not do – as we tackle our own transformations?

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Wednesday

EXECUTIVE SESSIONS AND MINDSETS & MOLECULES EXPERIENTIAL WORKSHOP

9:45 AM – 10:45 AM

Mindsets & Molecules: The Art and Science of Behavior Change

See description on page 5

Executive sessions:

Precision Medicine: Moving from the Lab to the Clinic

Grace Terrell, MD - President and Chief Executive Officer, Envision Genomics; Huntington Willard, PhD – Director, Geisinger National Precision Health; Kristen Murtos – Chief Administrative and Strategy Officer, NorthShore University Health System; Robert Robke, Vice President of Professional Services, 2bPrecise

The promise and power of precision medicine has at last crossed over the magical intersection of price and utility – moving from ‘fascinating’ to ‘essential’ in a series of key markets. Full genome sequencing will soon be available at affordable pricing and commercially viable for mass application. Learn why precision medicine matters and what it takes to get started from four leaders who share their perspectives – and challenges – in operationalizing precision medicine within clinical work flow.

Next Generation Networks: Winning through Consumer Value

Brigitte Nettlesheim – President, Joint Venture Markets and North Central Territory Leader, Aetna; David Vivero – Co-Founder and Chief Executive Officer, Amino Health; Todd Van Tol – Senior Vice President of HealthCare Value, Blue Cross Blue Shield of Michigan

Consumers increasingly demand better value for their money and broad variety in network options. At the same time, innovators have introduced new care delivery models into the market. Payers face a bifurcated set of network demands. How do they navigate legacy networks and relationships while meeting demand for innovative, personalized networks? What role might new entrants play? And, how might we reconsider our understanding of networks?

The Specialty Tsunami: Prescriptions for Successful Management

Brenda Motheral, PhD – Co-Founder and Chief Executive Officer, EpiphanyRx; Erin Hendrick – Vice President of Health-System Strategy, Shields Health Solutions; Sarah Marche, PharmD – Senior Vice President of Pharmacy Services, Highmark Health; Karen Staniforth – Senior Vice President of Pharmacy, Rite Aid

Specialty pharmacy spend is the single biggest driver of increasing medical costs. To understand the specialty pharmacy problem, we must understand what makes an approach successful. Hear from constituents across the supply / value chain leveraging different mechanisms to make high-cost drugs sustainable long-term.

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MAIN STAGE SESSIONS

11:00 AM – 12:00 PM

It Was the Best of Times, It Was the Worst of Times: Pharmacy's Problems and Potential

Julie Grant – Partner, Canaan Partners; Jeff Eberle – Chief Executive Officer, TruVeris; Rina Shah – Group Vice President, Specialty and Retail Pharmacy, Walgreens

Every day, it seems another part of the drug industry is publicly pilloried. Pharmaceutical executives are being called to Capitol Hill, the value of pharmacy benefit managers is questioned, retail pharmacies are facing the double whammy of retail and healthcare industry transformations, and everyone is struggling with skyrocketing drug costs. But in the face of these challenges, we're seeing consumer-friendly innovation — from investors starting pharma companies, to retailers expanding access, to new data solutions leveling the price playing field. How can innovations become scalable, and what's the true potential of pharmacy affordability?

A Quantitative Solution to a Moral Problem

Duane Reynolds – President, Institute for Diversity and Health Equity, American Hospital Association

Health inequity still persists at alarmingly high rates. The healthcare playing field remains uneven, with healthcare inaccessible and unaffordable for many in our communities. How much progress have we really made if our innovations aren't available to everyone? Duane Reynolds has spent his career figuring out how analytics can improve health equity, creating healthier humans, healthier organizations, and healthier bottom lines. He'll explain how to bring health innovation to those who need it most.

CLOSING LUNCH

12:00 PM – 1:00 PM

Reflect upon the Summit experience over a final lunch with fellow healthcare executives.