



Smart decisions. Lasting value.™

Crowe Healthcare Summit 2019

Nurture Your Network

Upskill. Connect. Grow.

October 7, 2019



Welcome



- The Three Horizons
- The value of new business models for healthcare
- Who, When, Where: Digital transformation in other industries
- Starting the journey
- Horizons in action

Agenda

Why should you care about transforming to thrive in the digital economy?

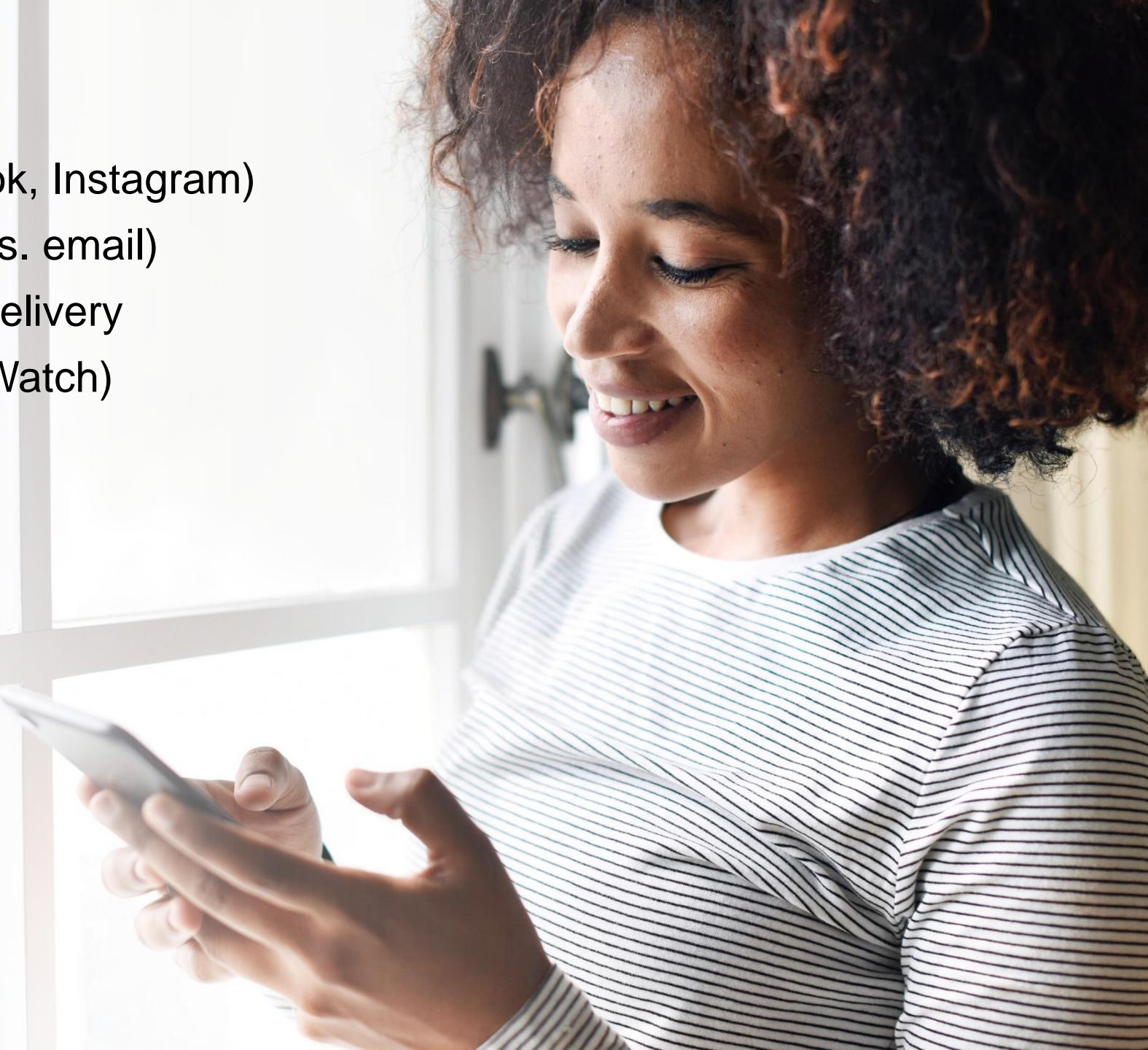


The journey begins...

Creating customer experiences in the digital economy.

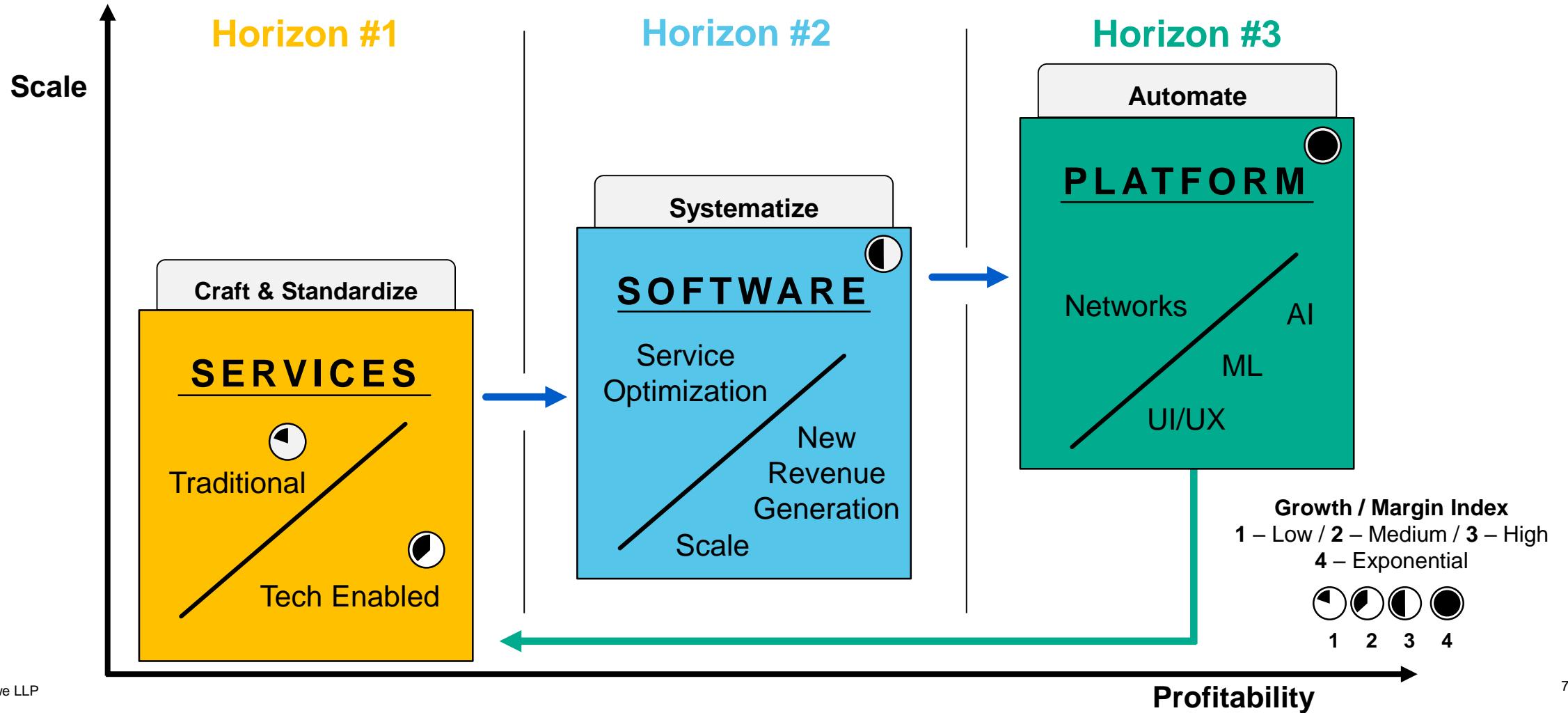
- **What types of technology** do you use that enable your everyday life?
- What's the **speed of experience** that you now expect?
- Look around you as a consumer. **What has changed?**
- How do you **purchase** goods and services, **access** and **digest** information?

- Social networks (Facebook, Instagram)
- Communication by text (vs. email)
- Same (or next) day free delivery
- Wearables (Fitbit, Apple Watch)
- Alerts set on your phone
- “One click” purchase
- Netflix (on demand)
- “Push” content



“The Three Horizons”

We must live in these 3 horizons at the same time



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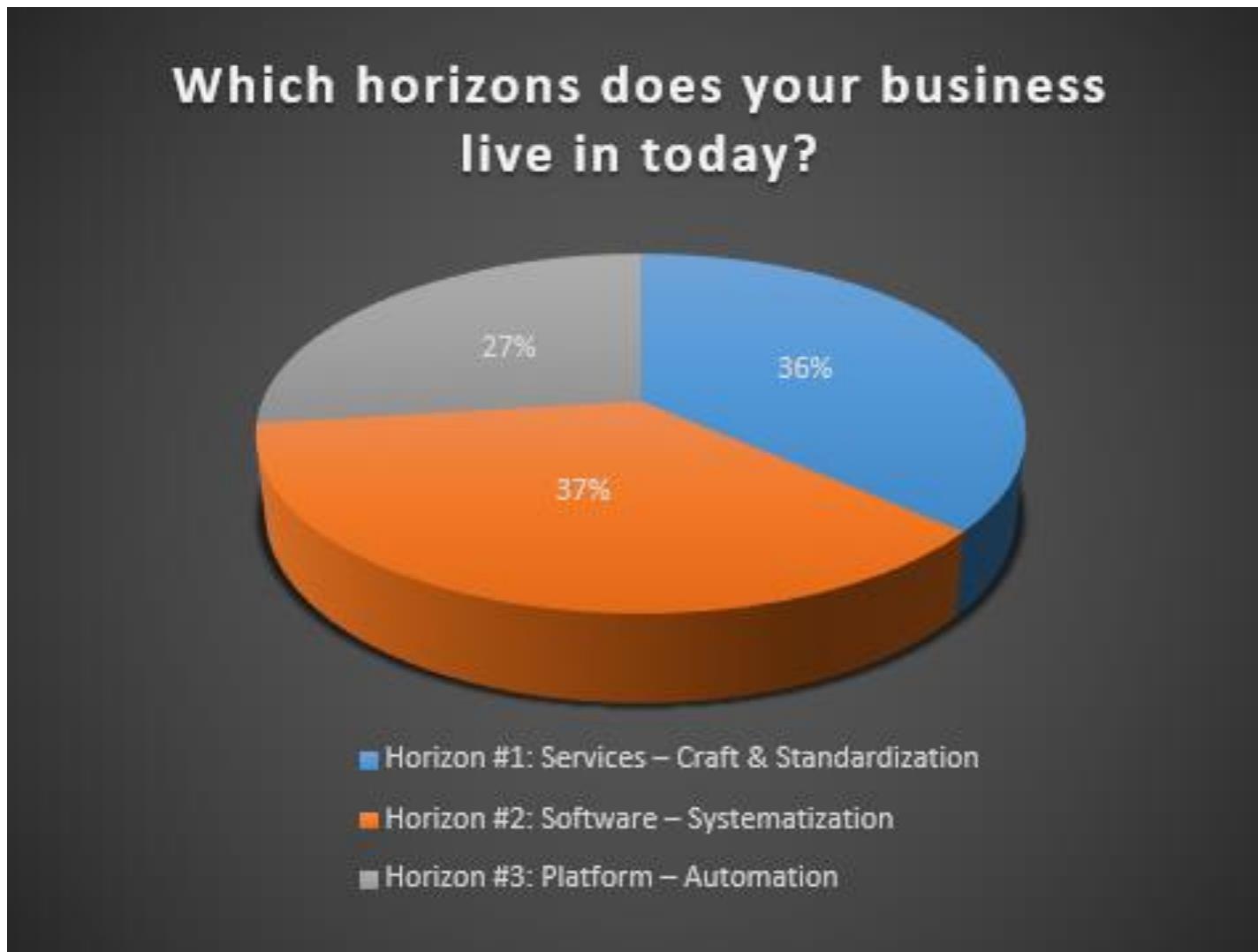
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Webinar polling results



The healthcare provider industry lags behind in taking this journey and that makes us vulnerable.

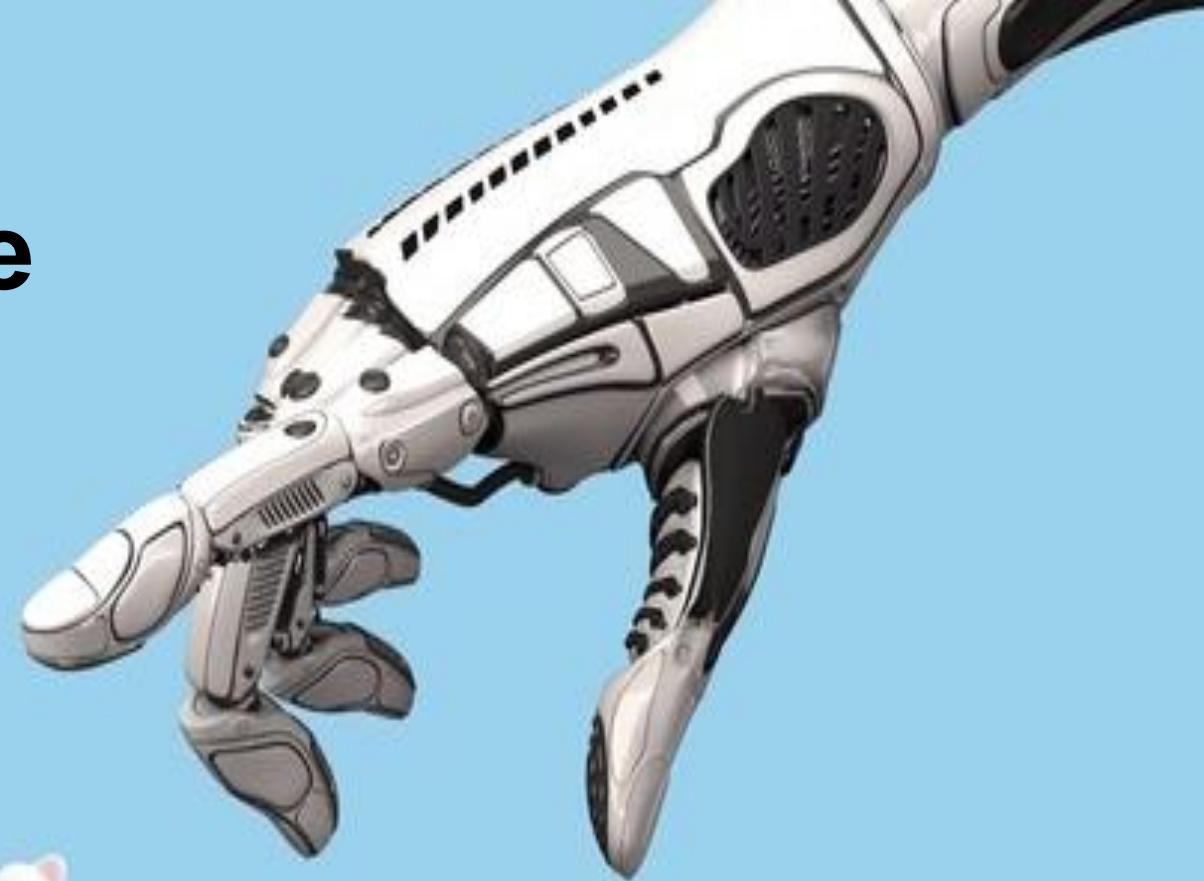


Calming Fears of Change

Our People ***AND*** Machines

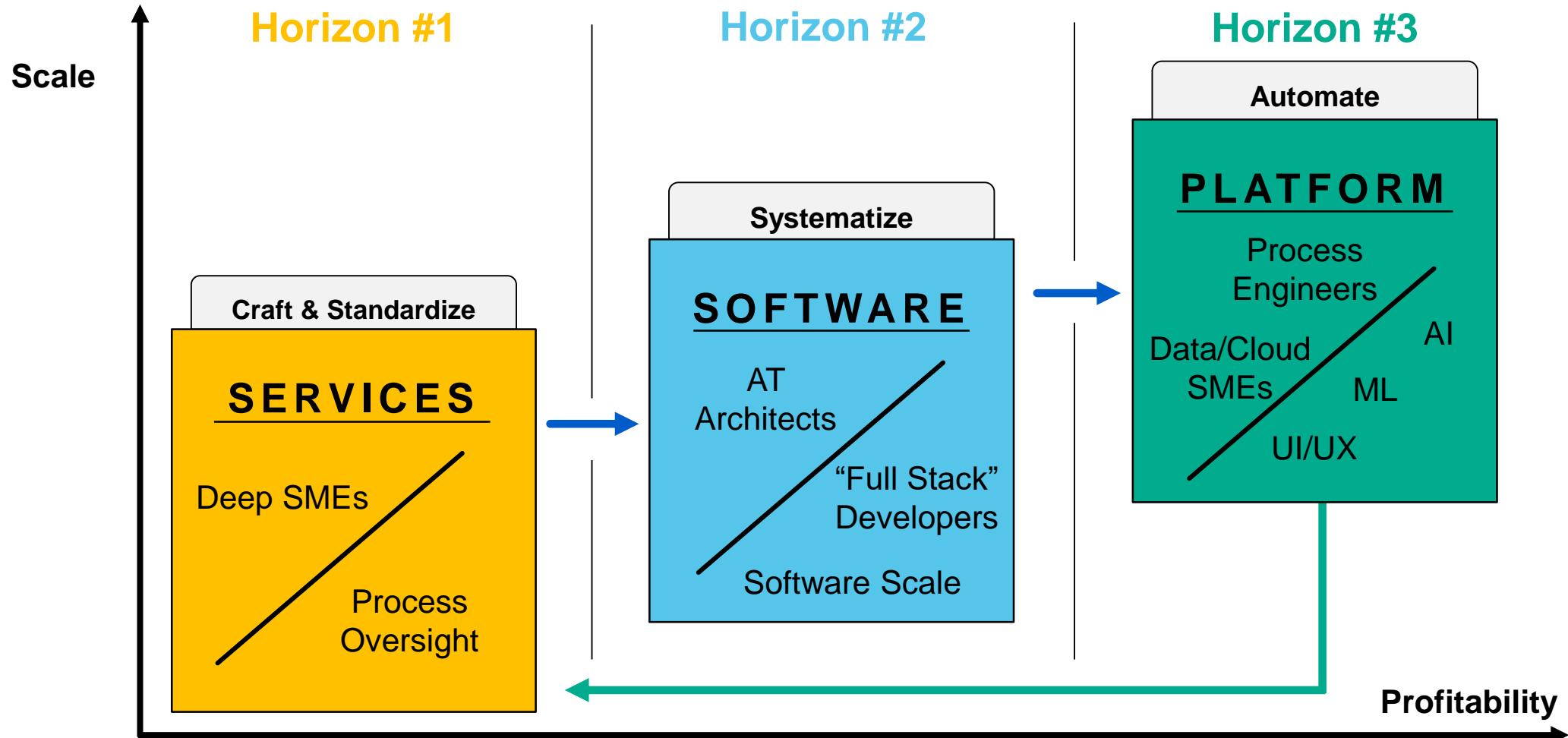
NOT

Our People ***OR*** Machines



“The Three Horizons”

Different horizons need different skill sets



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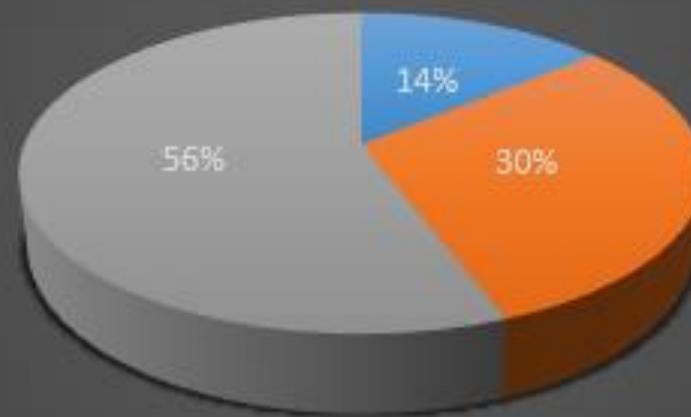
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Webinar polling results

If you think about each horizon
being a different business model,
which model has the most value in
the market?



- Horizon #1: Services – Craft & Standardization
- Horizon #2: Software – Systematization
- Horizon #3: Platform – Automation

“Leadership requires two things:
a vision of the world that
does not yet exist,
and the ability to
communicate it.”



How are other industries transforming?

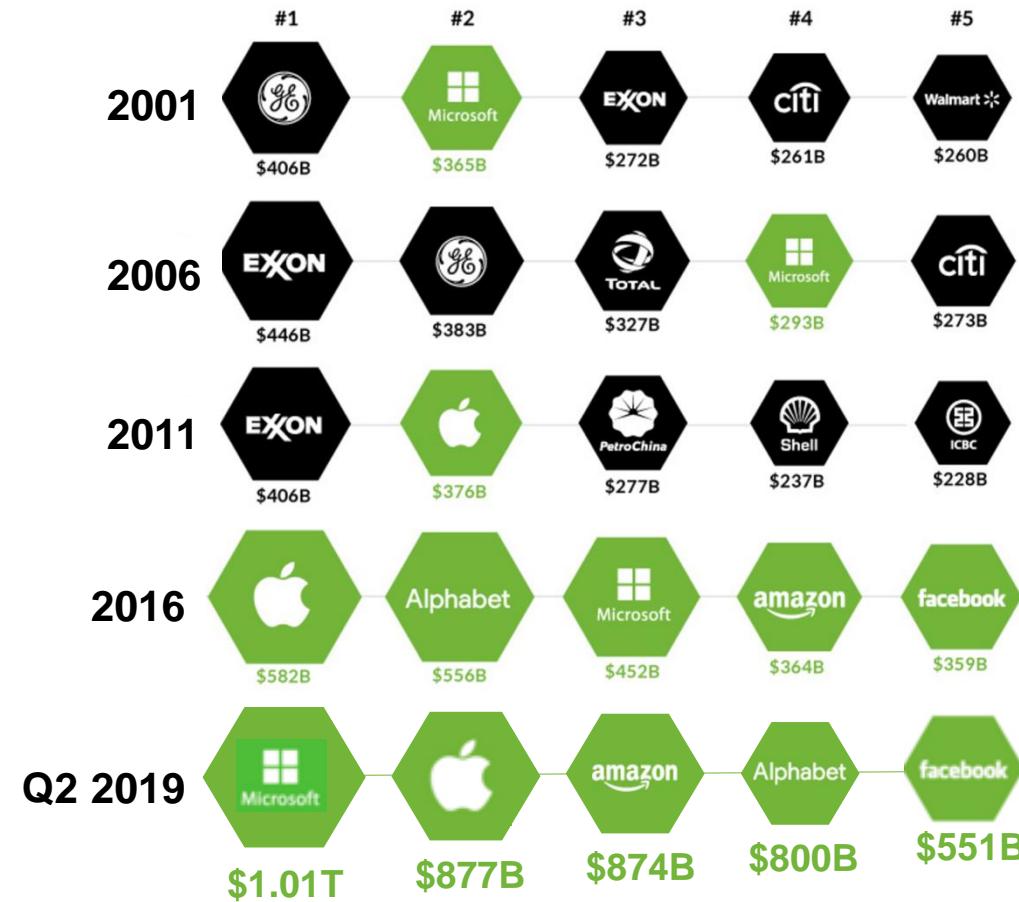
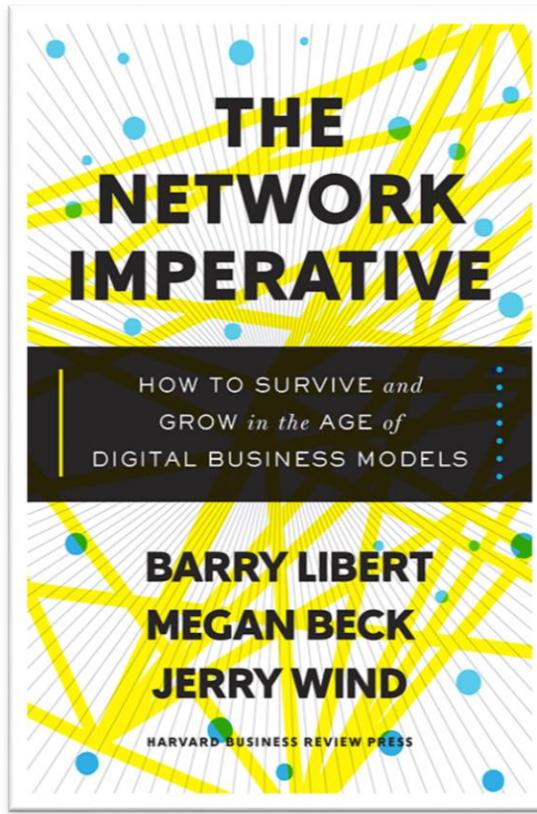
Stay standing if...

Highly engaged consumer relationships

AI powered personalized offers

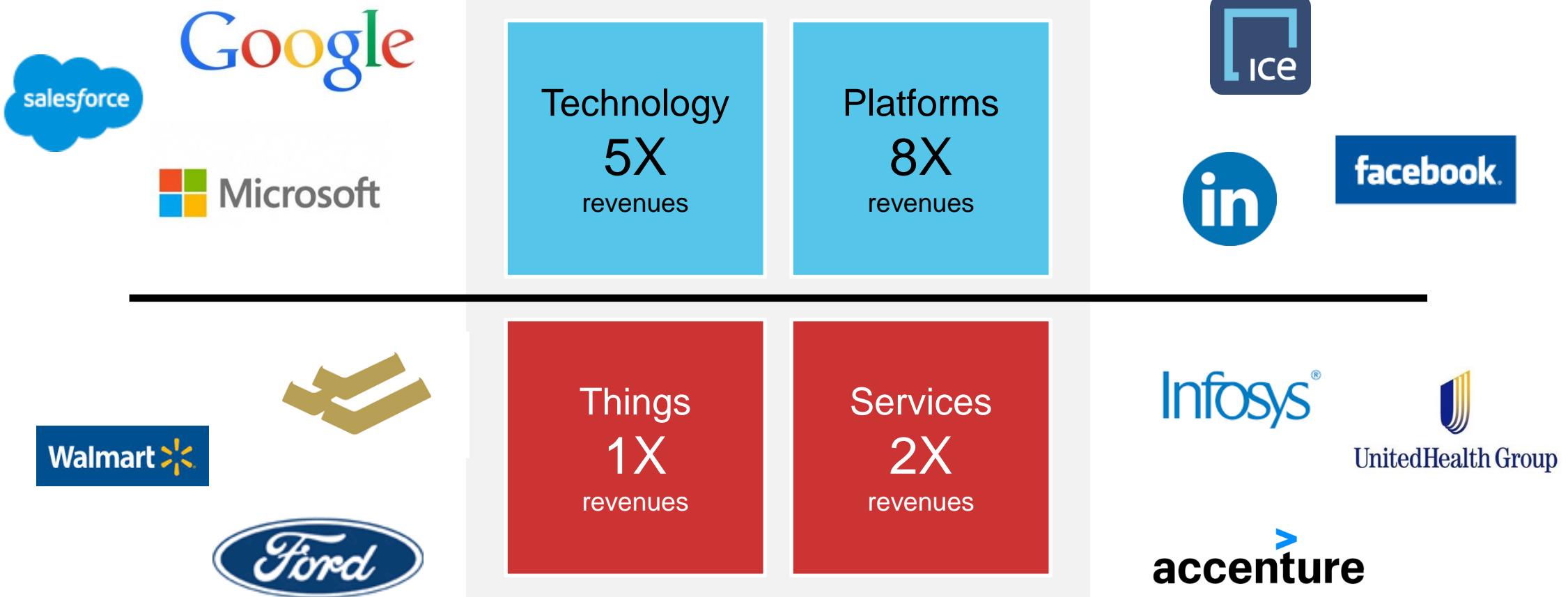
True platform business

It's a winner-take-all economy

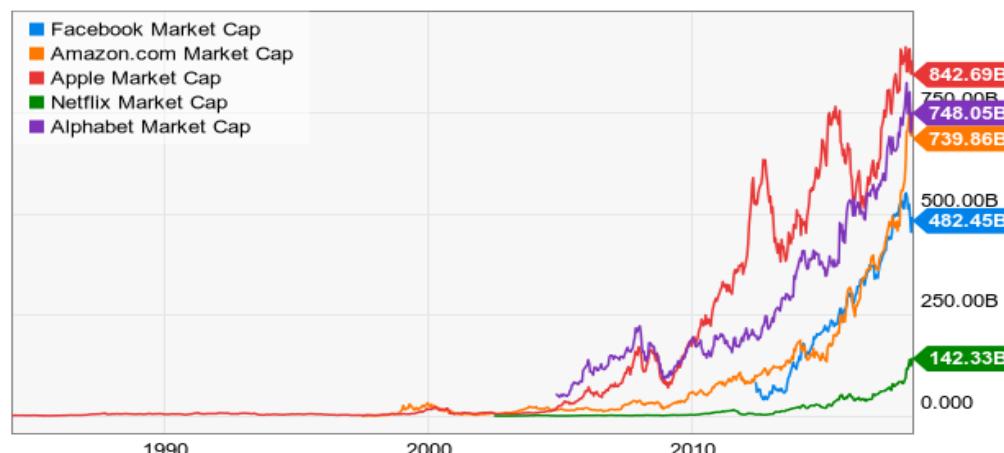
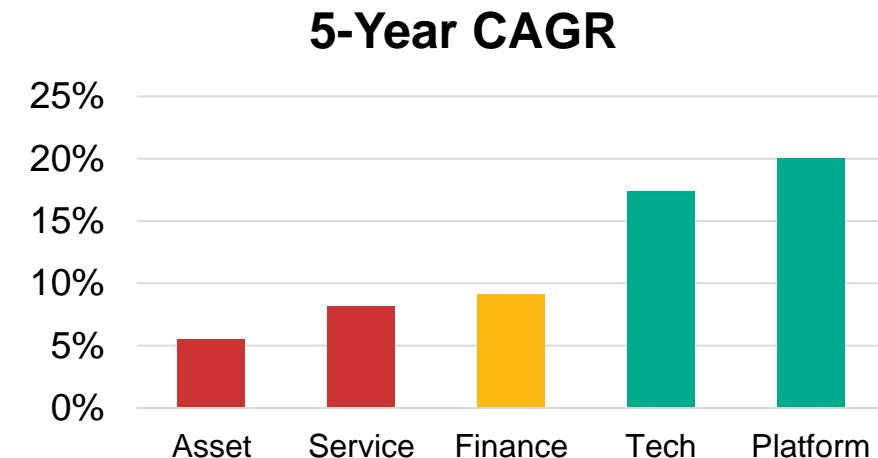
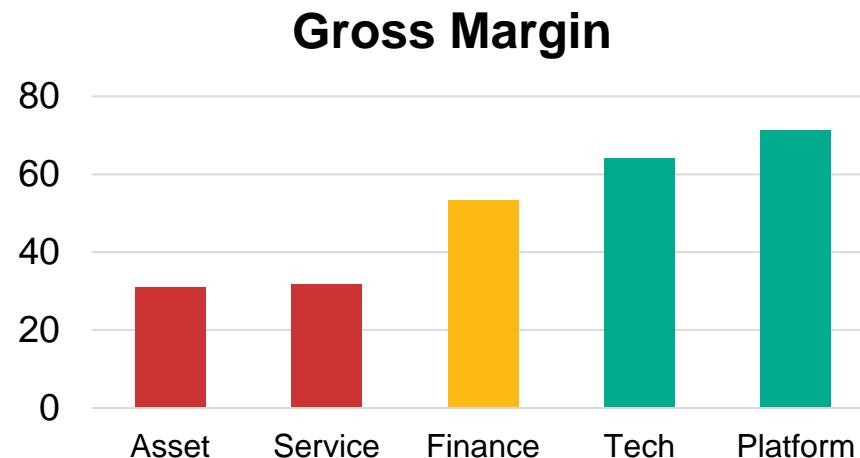


Source: Data from Thomson Reuters Eikon, May 2017

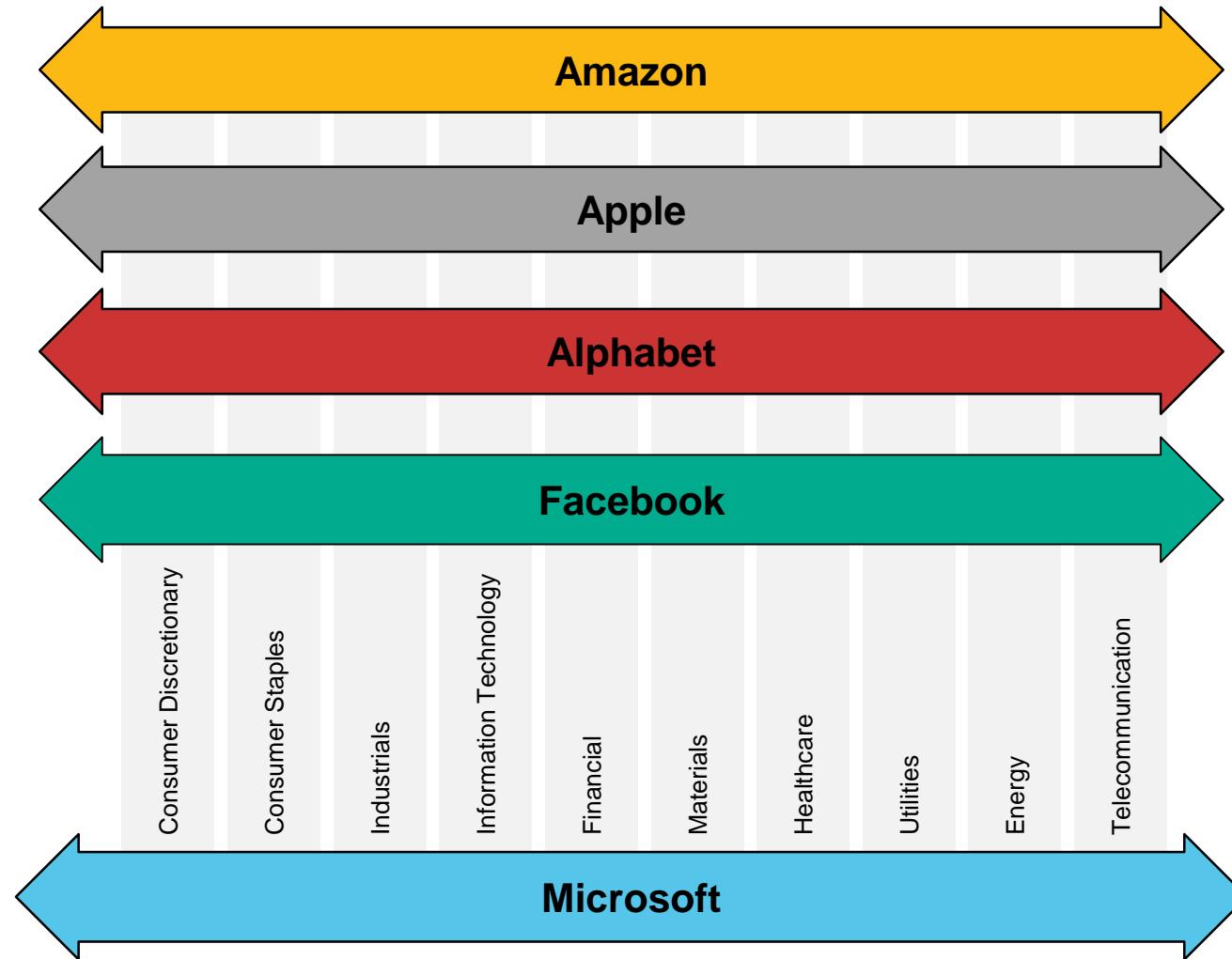
Different business models, different valuations



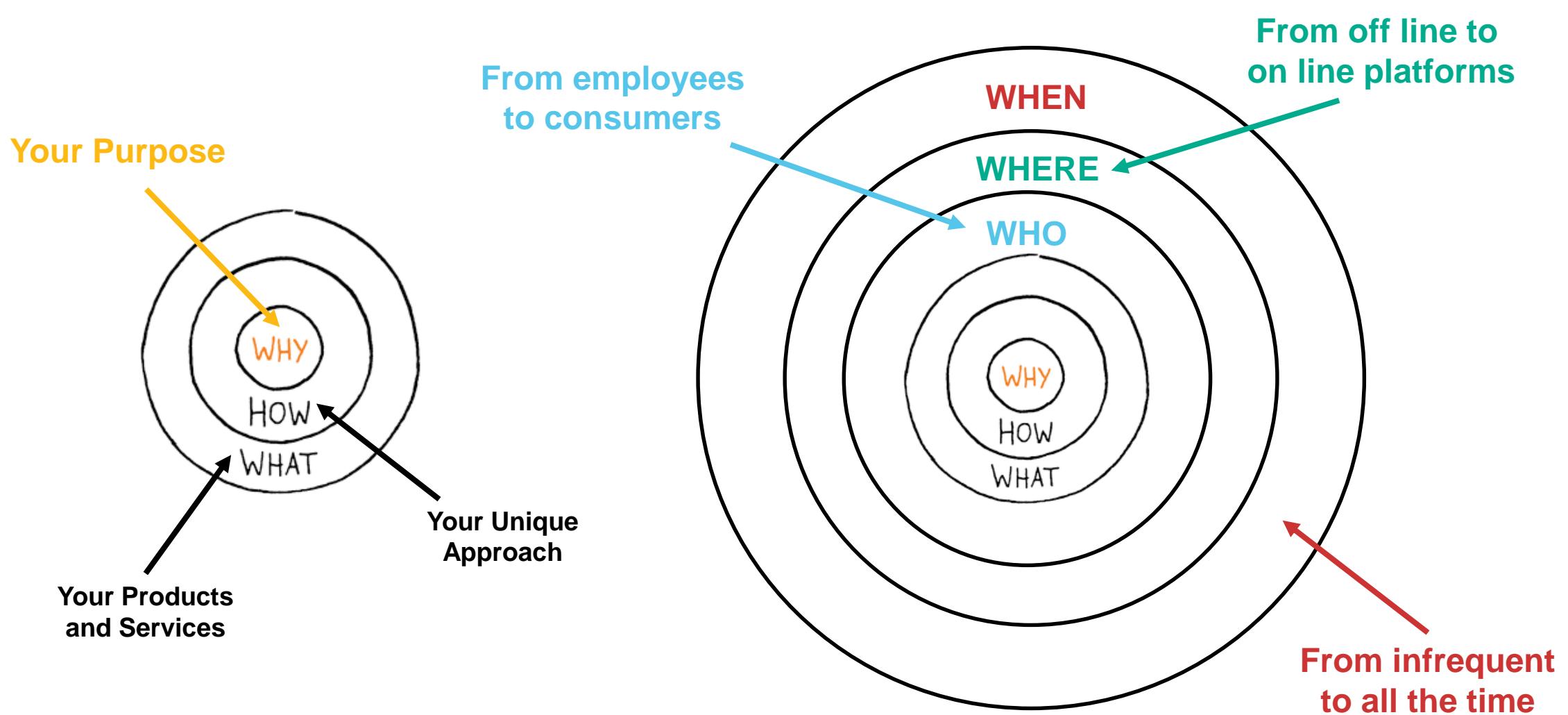
And different results...



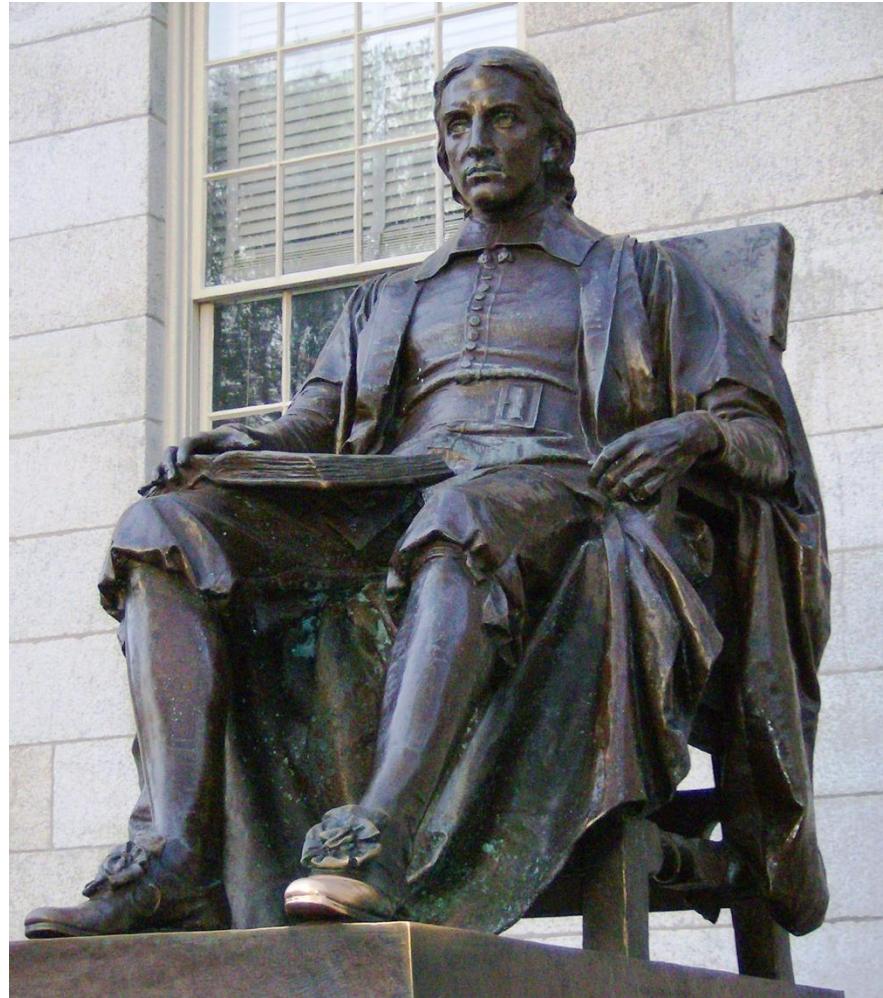
Next Up: Platforms Going After All Industries



Three New Rules for Success



WHO and WHY Both Matter

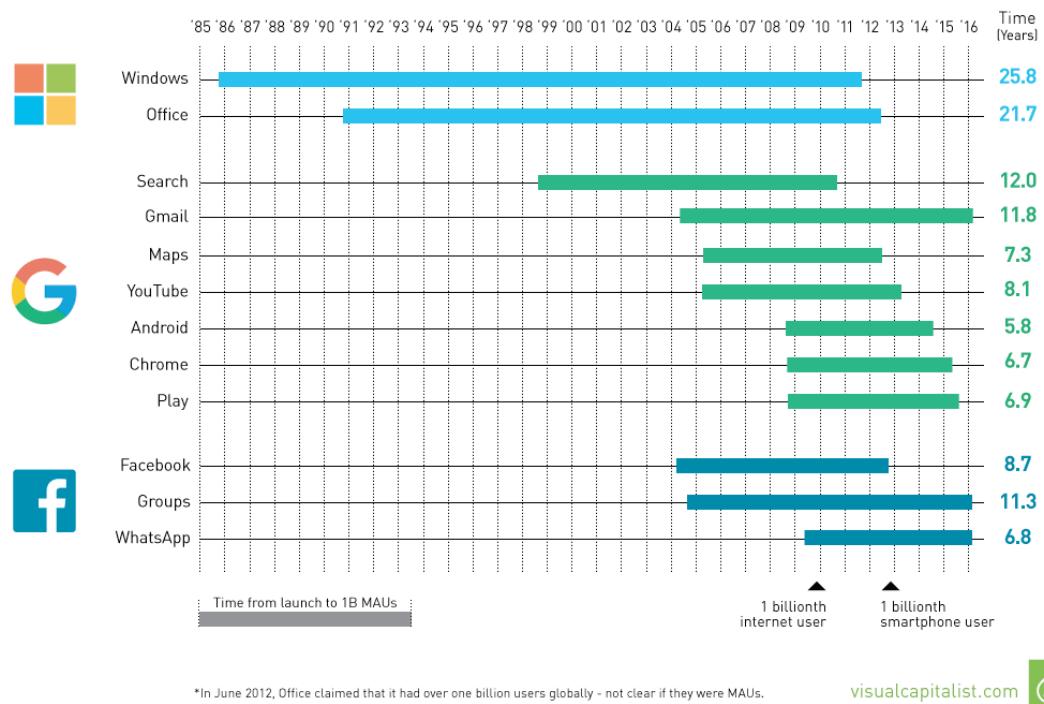


Platforms Obsessed with WHO Growth

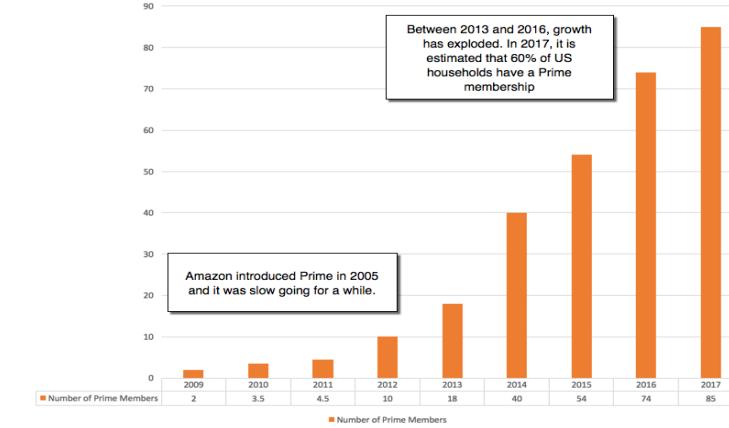
Chart of the Week

TIMELINE: THE MARCH TO A BILLION USERS

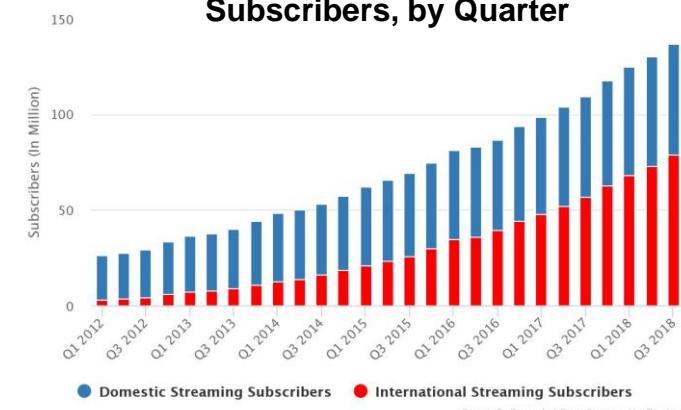
There are 12 apps with 1 billion+ monthly active users. Here's how long each took to get there.



Number of Prime Members



Number of Netflix Streaming Subscribers, by Quarter



WHERE (On-Line) is the New Driver

**THE MEDIUM IS
THE MESSAGE**

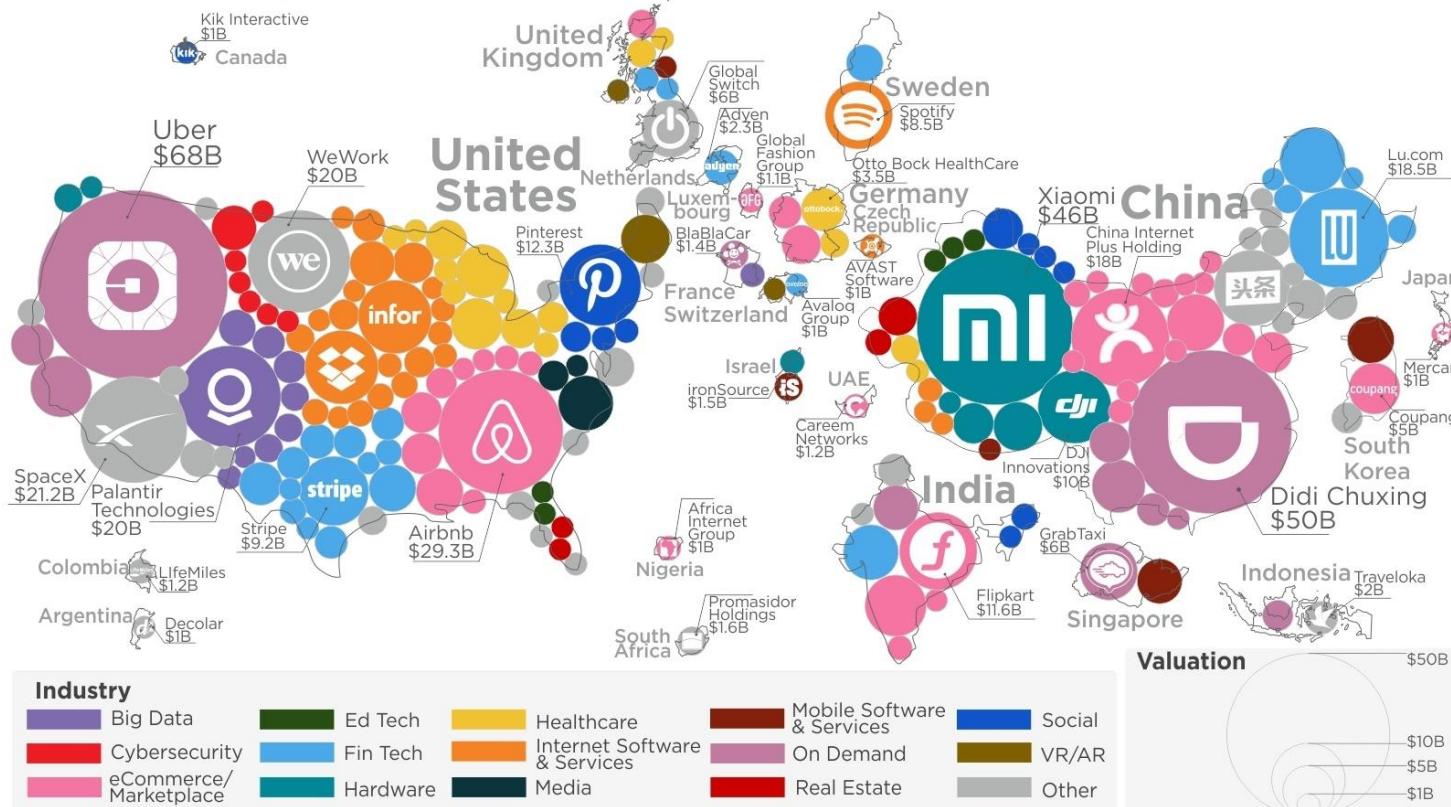
THE TECHNOLOGY THAT
'COMMUNICATES' CHANGES US



Platforms Are Emerging Everywhere

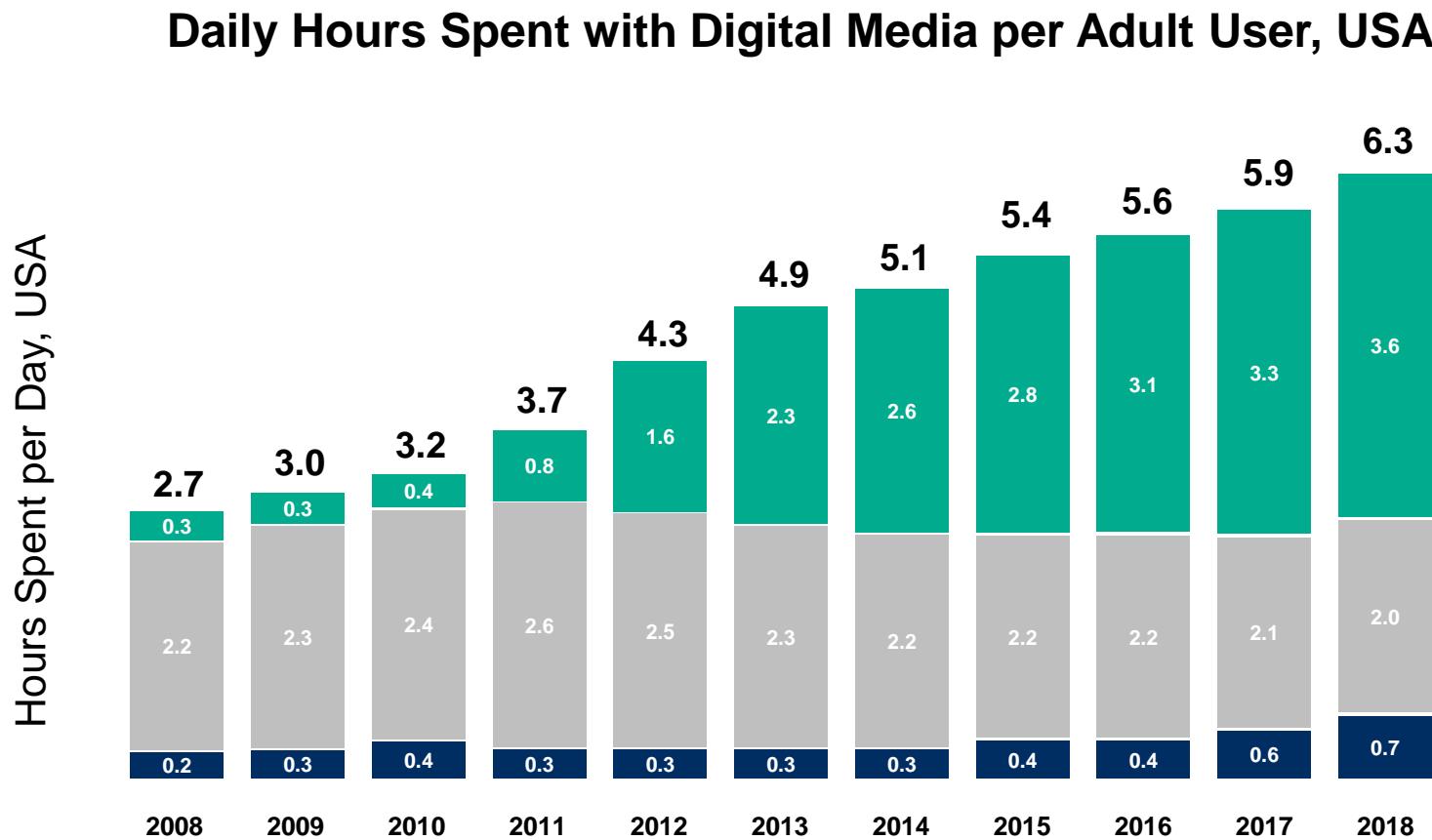
The World's Unicorn Companies 2017

All Private Companies Valued At \$1B+



howmuch ^{net}

In the Convenience Economy...



WHEN is Where It's At...



What does this all mean?

- 1 **What's the implication of disruption in other industries for healthcare?**
- 2 **What's allowing other industries to make the transition?**

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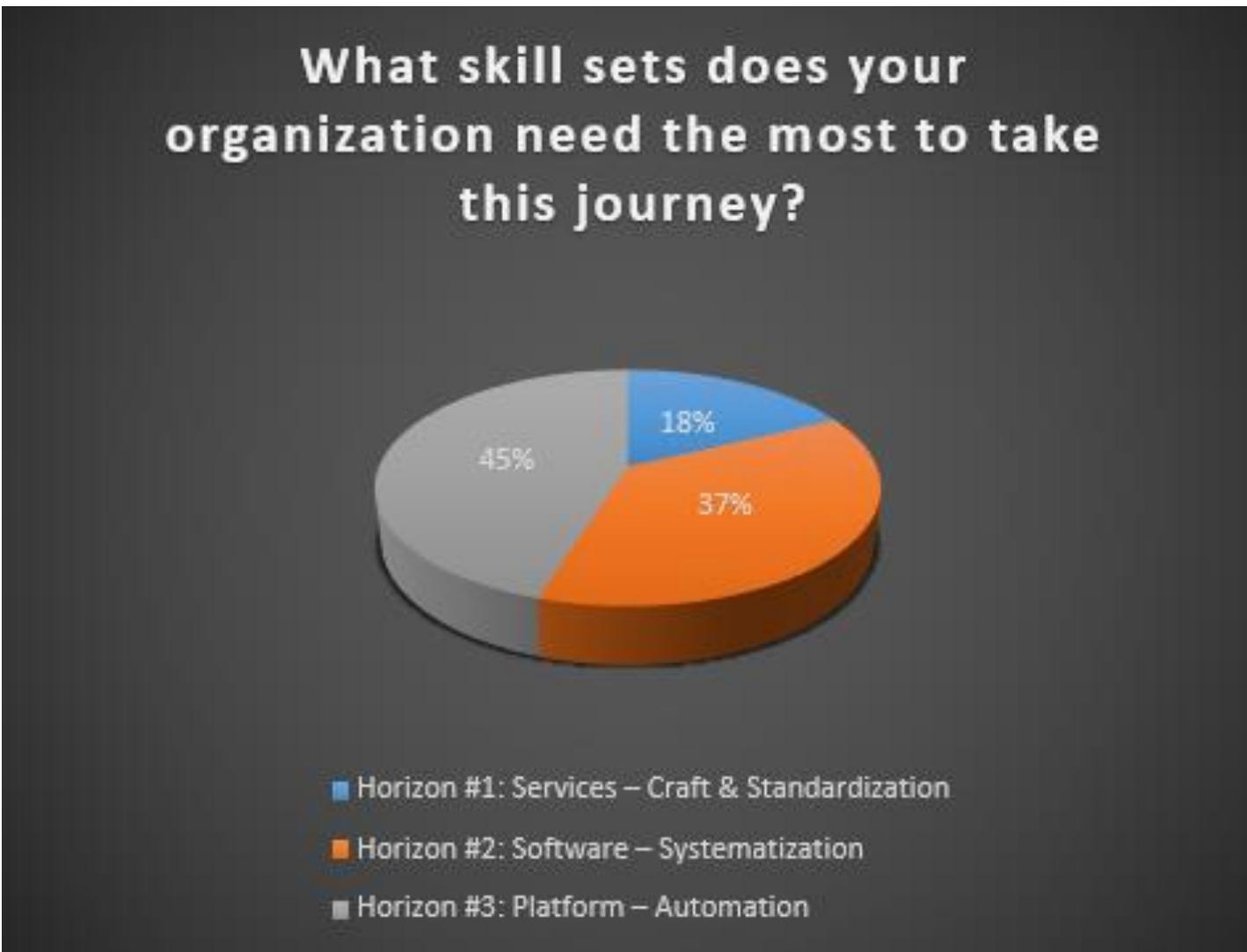
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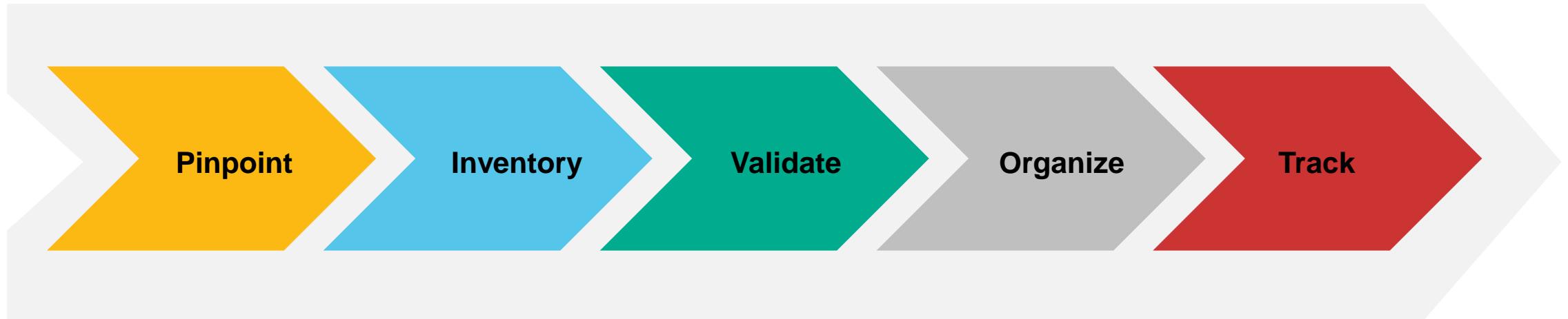
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Webinar polling results

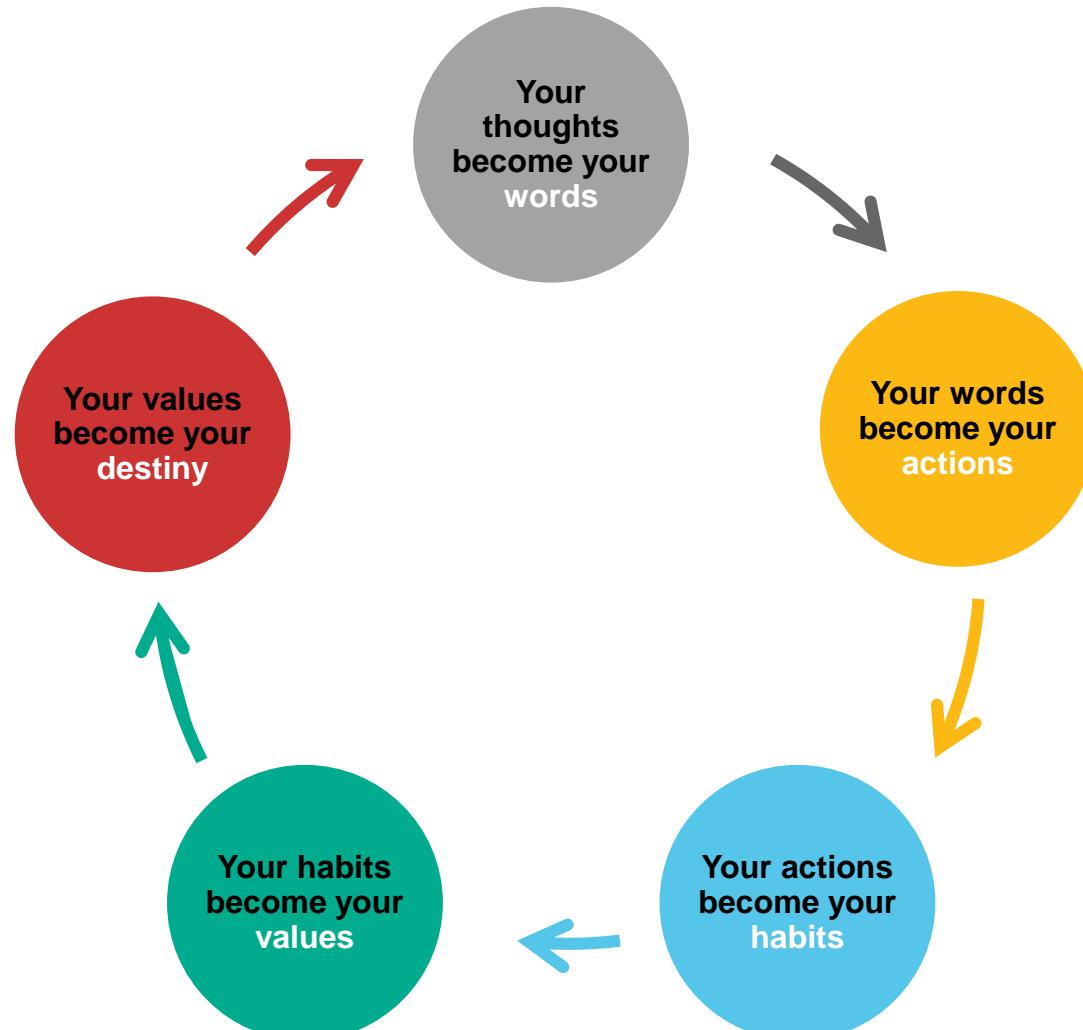


**What actions should you take
to start the journey?**

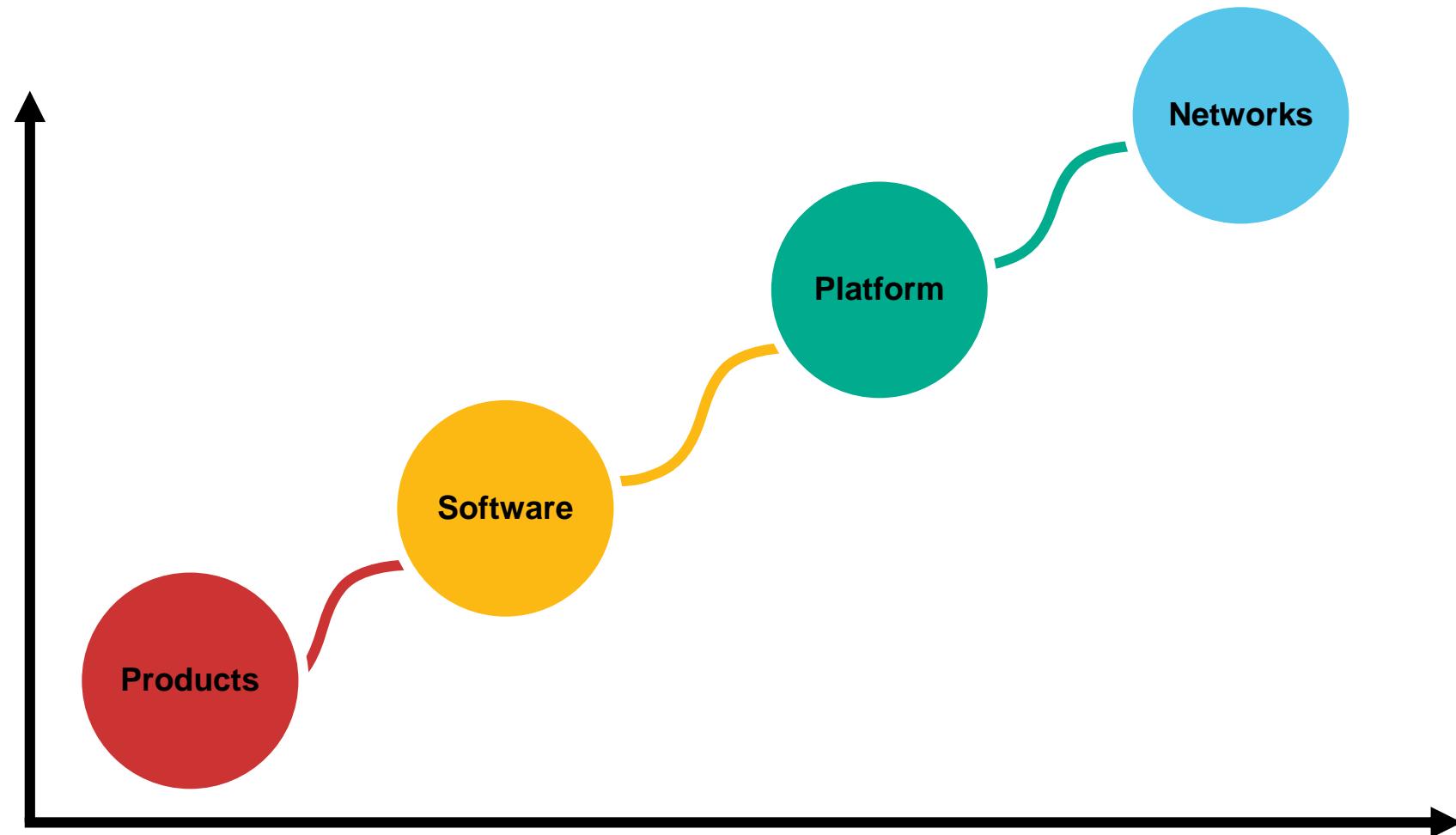
PIVOT Your Business Model



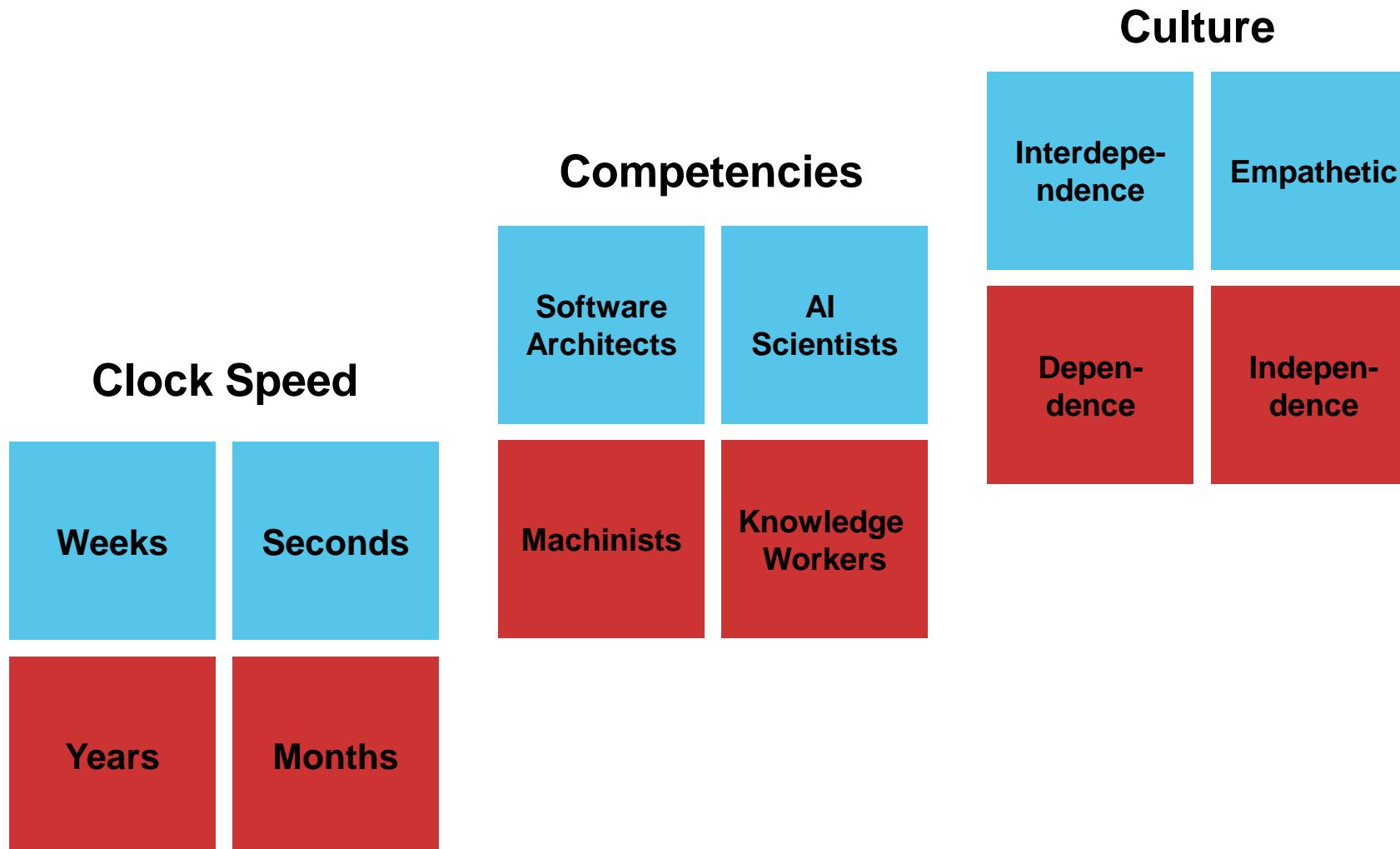
PINPOINT: Your Thoughts



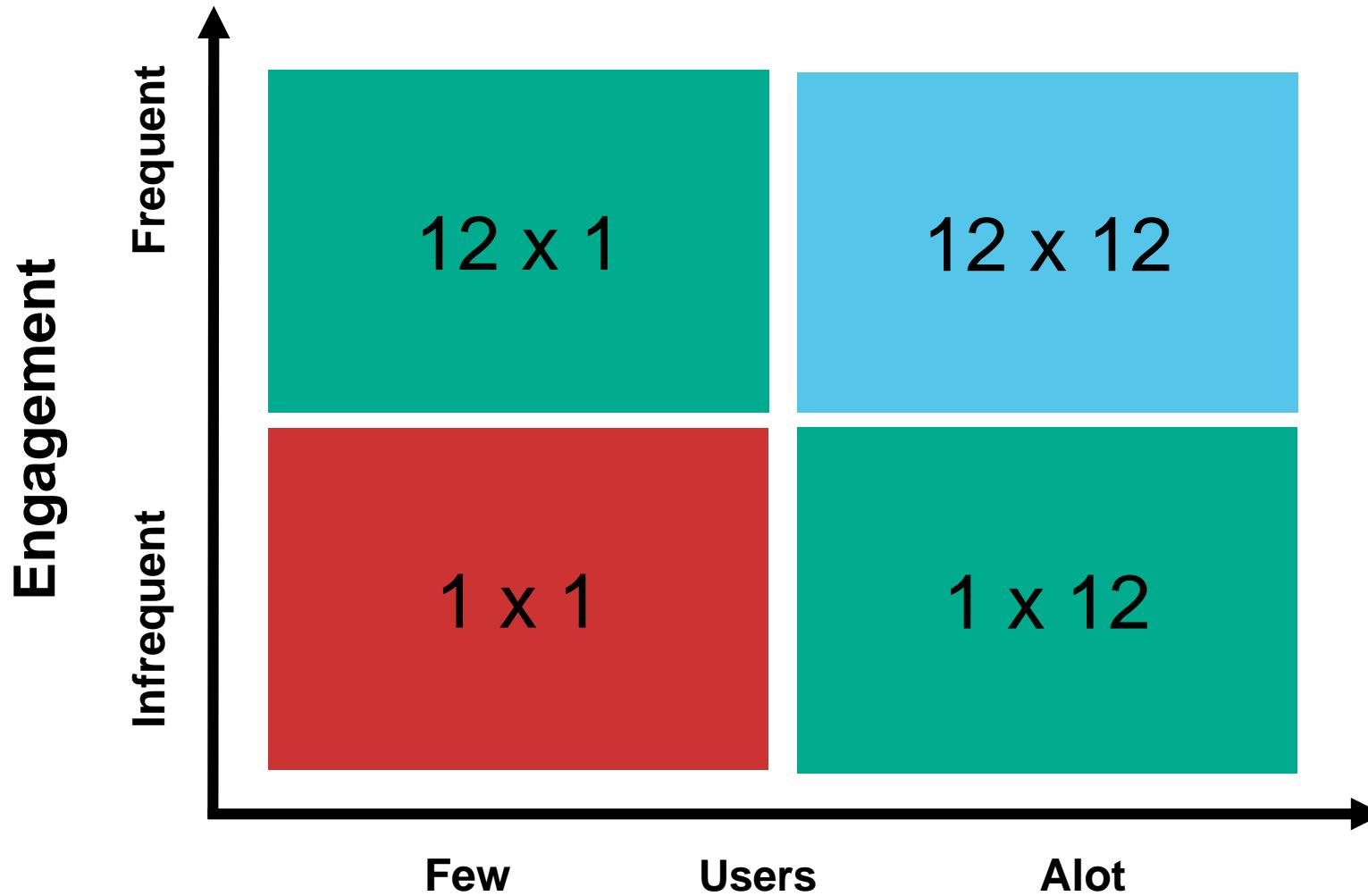
INVENTORY Your Assets



ORGANIZATION: New Skills, Speed and Culture



TRACK: How Many X How Often

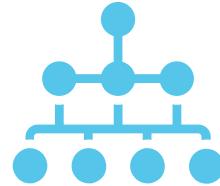


Healthcare Horizons case studies

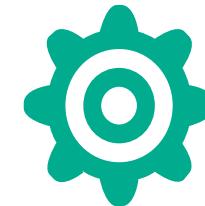
Services

1
2
3

Software



Platform



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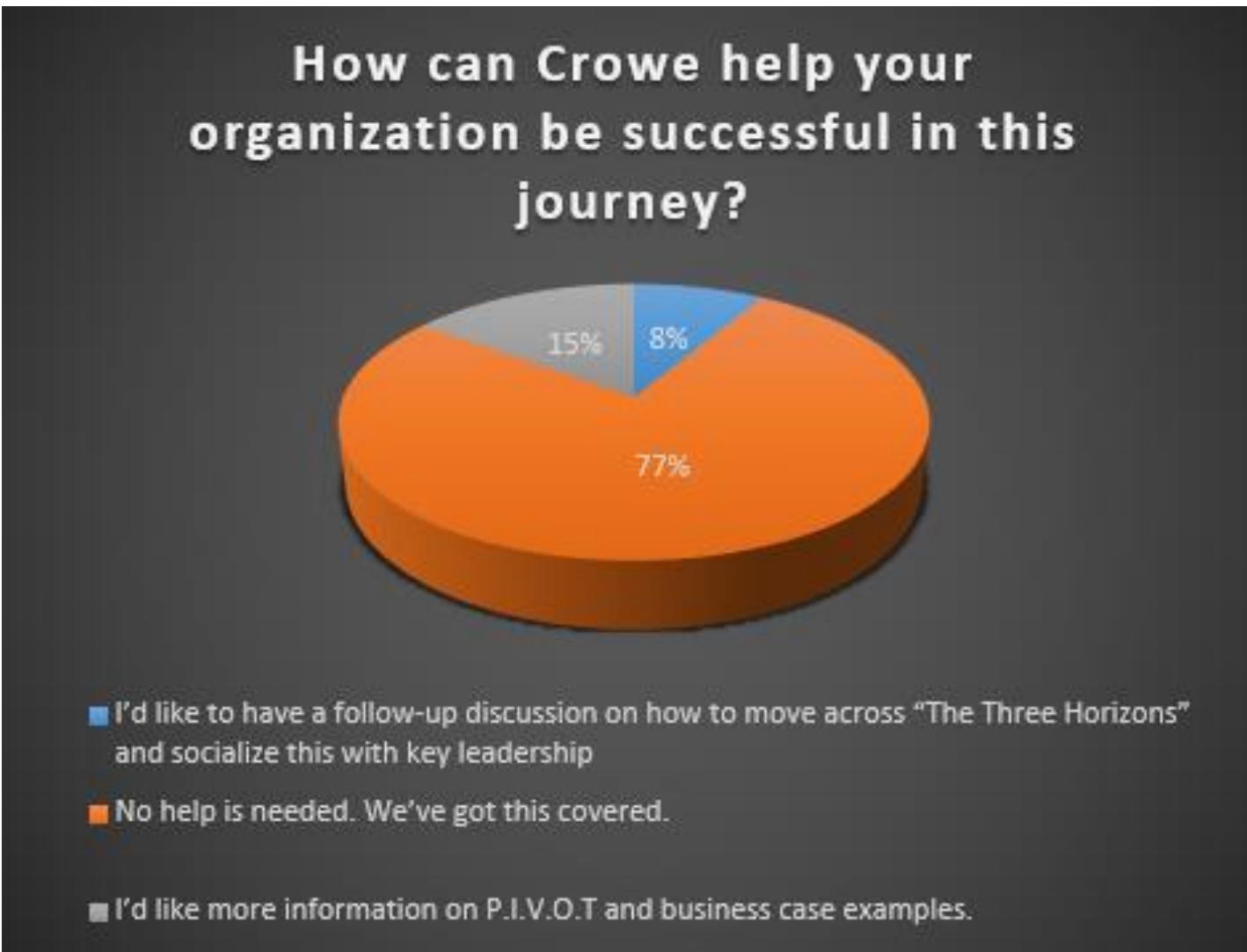
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Webinar polling results



- The healthcare industry is **not unique**.
- The healthcare industry is **lagging behind** in the journey and we must act.
- Creating the “Customer Experience” and “The Three Horizons” **applies to all of us**.

Keep thinking about:

- What leading organizations/competitors are doing?
- What leading organizations/competitors are *not* doing?
- What kinds of assistance does my organization need to be able to take this journey?

Final Thoughts

A photograph showing the lower half of a person's body, wearing dark blue jeans and light-colored sneakers. The person is walking on a dark asphalt road. A thick white arrow is painted on the road, pointing upwards. The perspective is from behind the person, looking down the road.

Let's take
the journey
together