



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?**

A photograph of a person's legs from the knees down, wearing blue jeans and dark shoes, standing on a dark asphalt road. A large, white, hand-painted arrow points directly forward from the person's feet, extending towards the horizon. The background is a dark, solid color.

The journey begins...

Creating customer experiences in the digital economy.

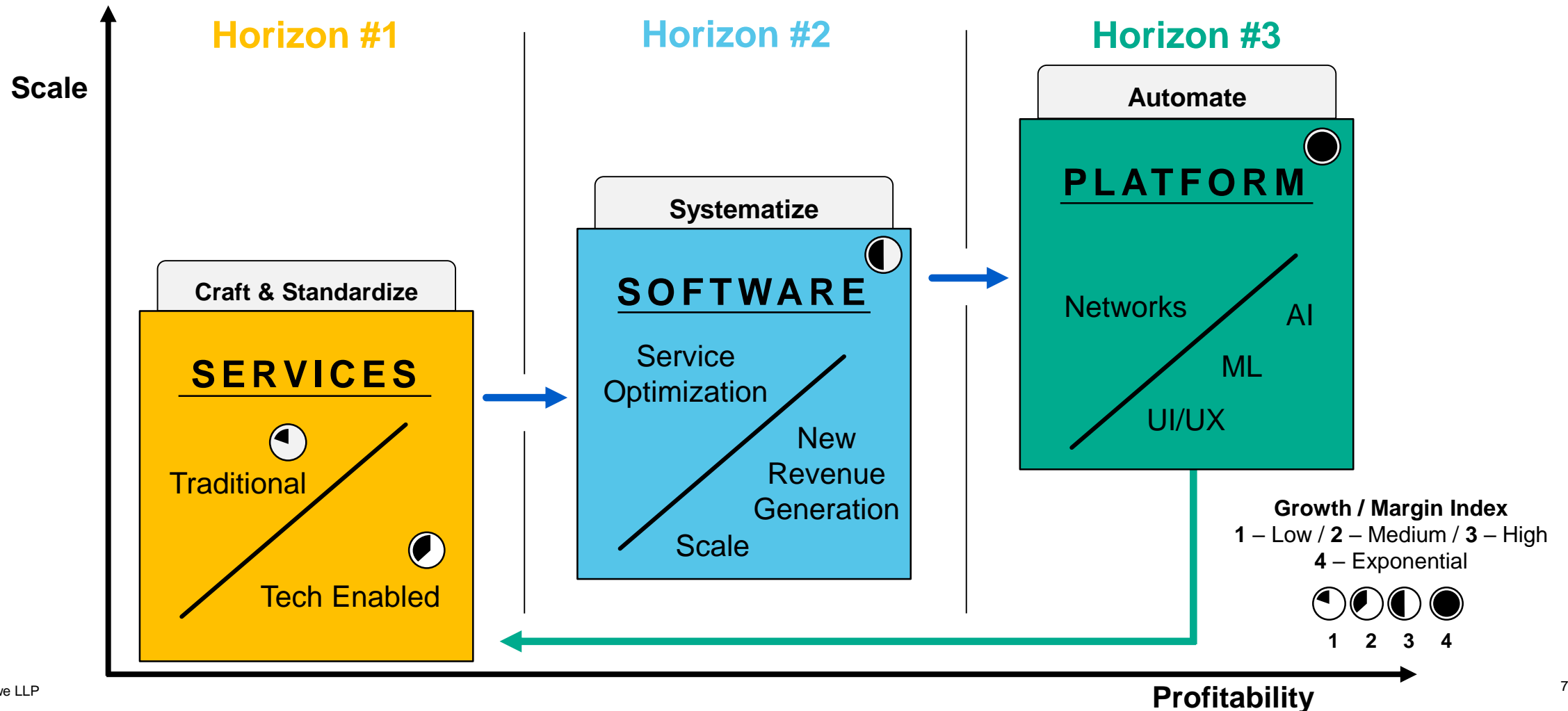
- **What types of technology** do you use that enable your everyday life?
- What's the **speed of experience** that you now expect?
- Look around you as a consumer.
What has changed?
- How do you **purchase** goods and services, **access** and **digest** information?

- 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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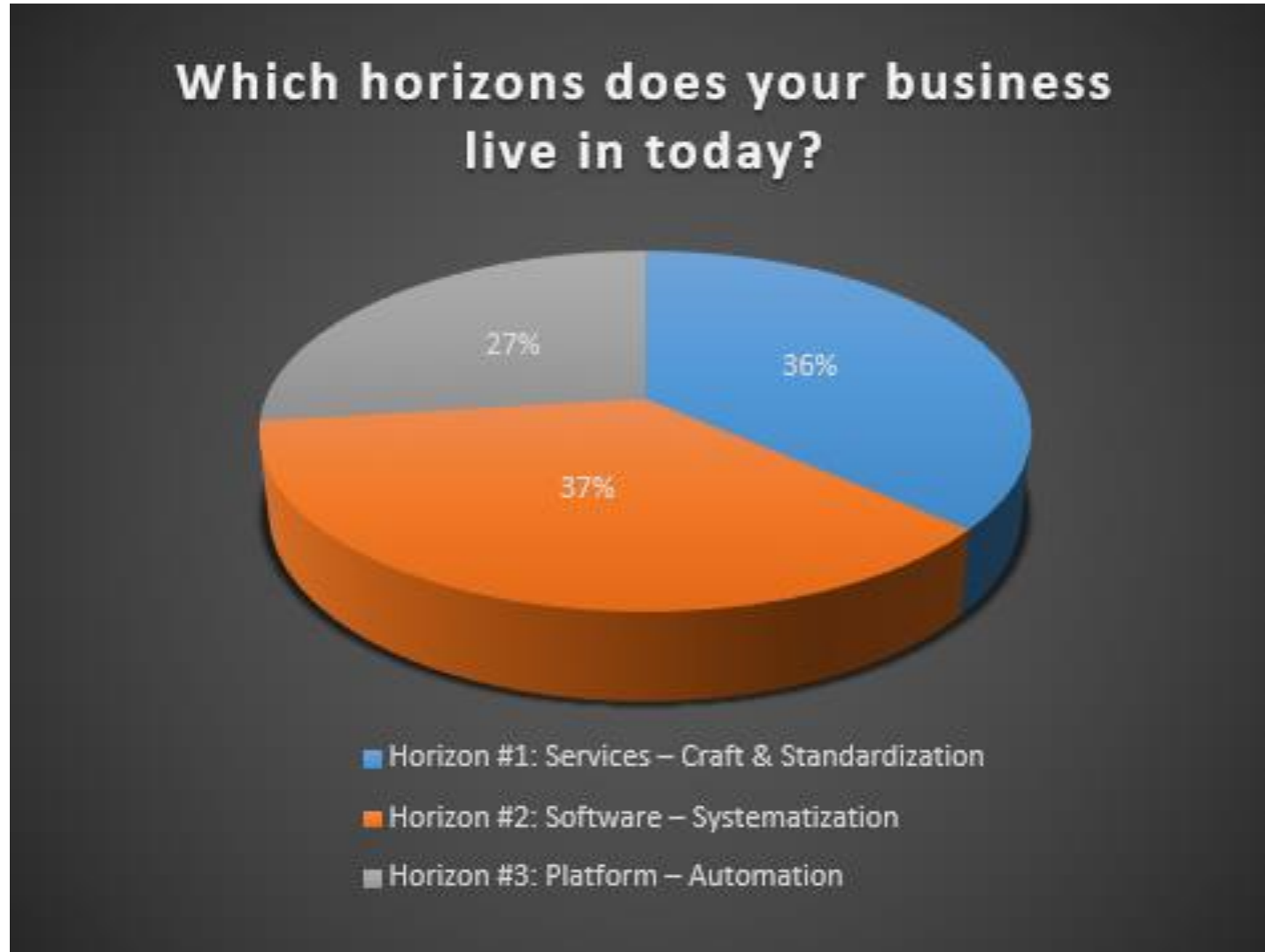
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Webinar polling results



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



Calming Fears of Change

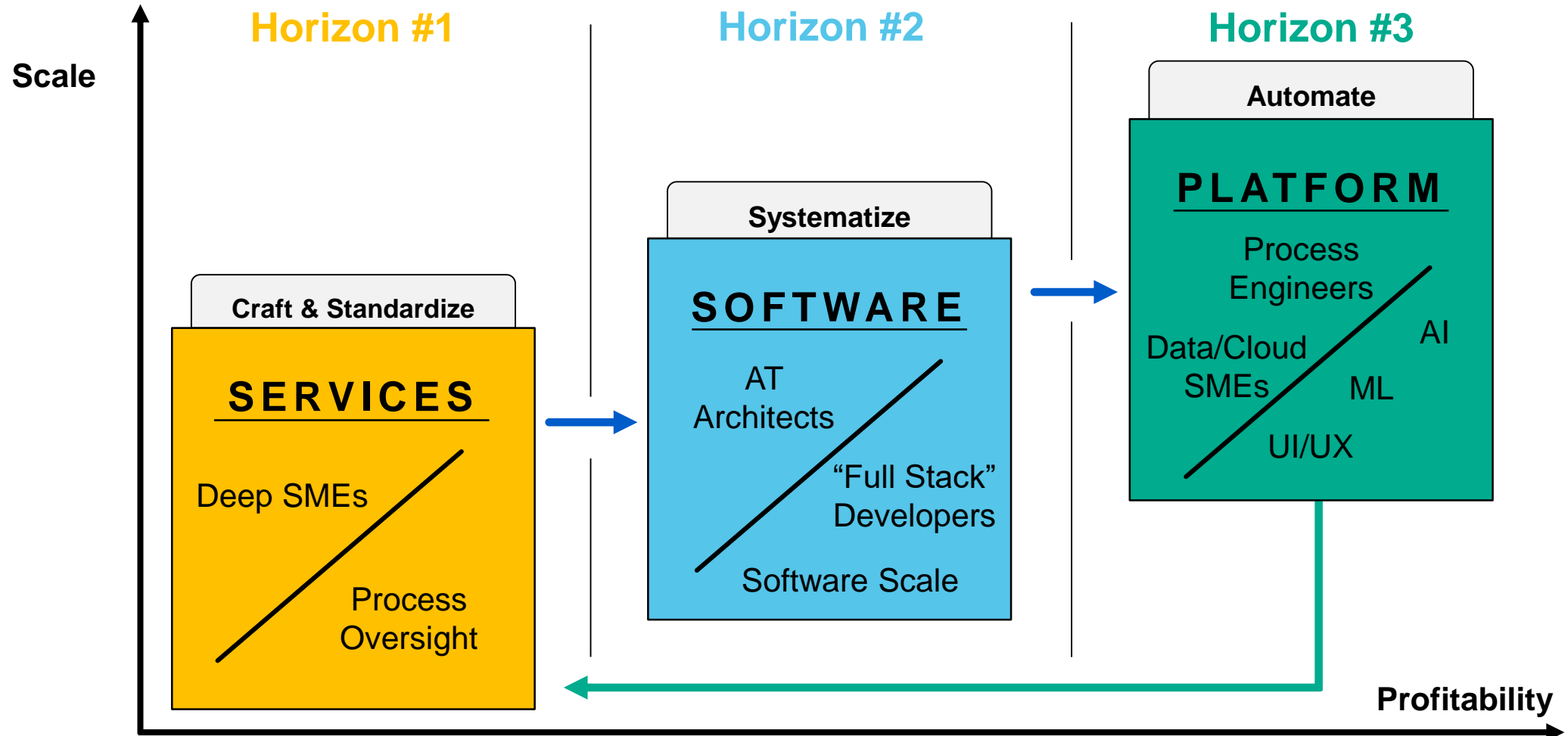
Our People **AND** Machines
NOT

Our People **OR** Machines



“The Three Horizons”

Different horizons need different skill sets





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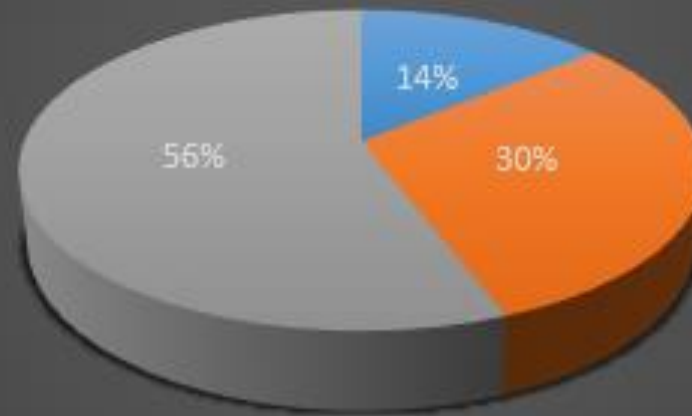
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Webinar polling results

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?**

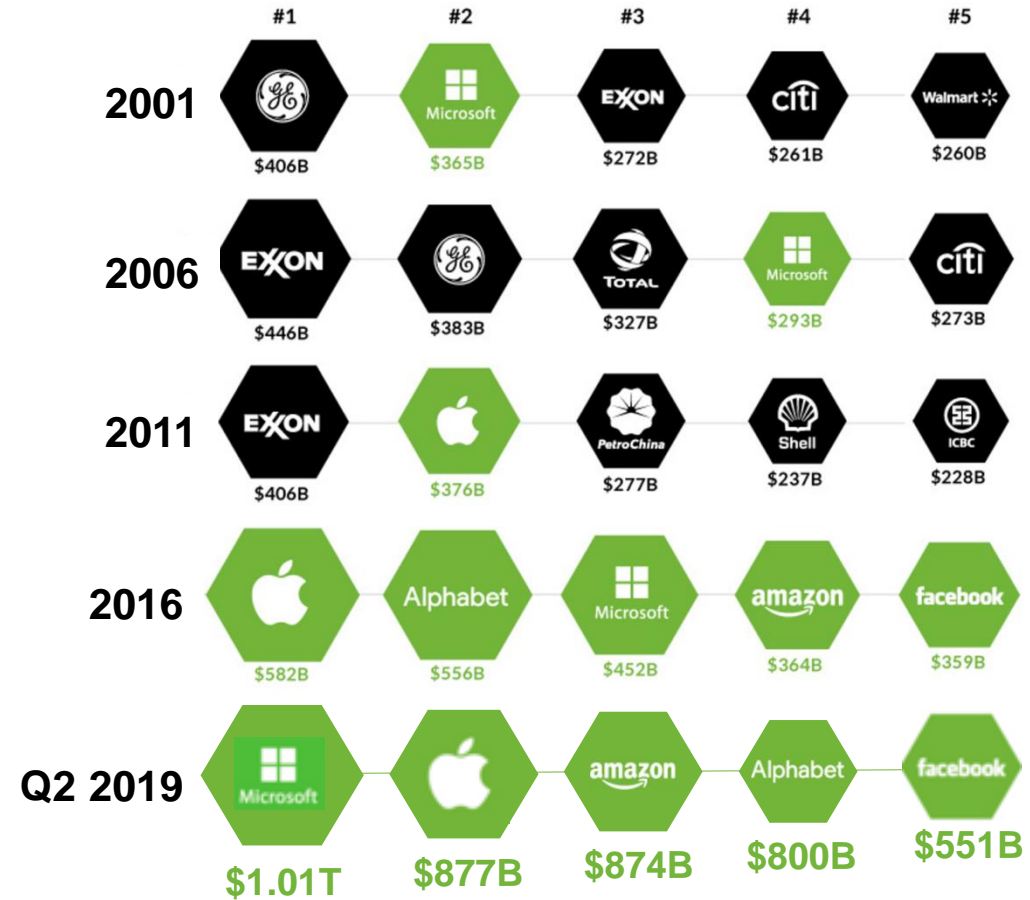
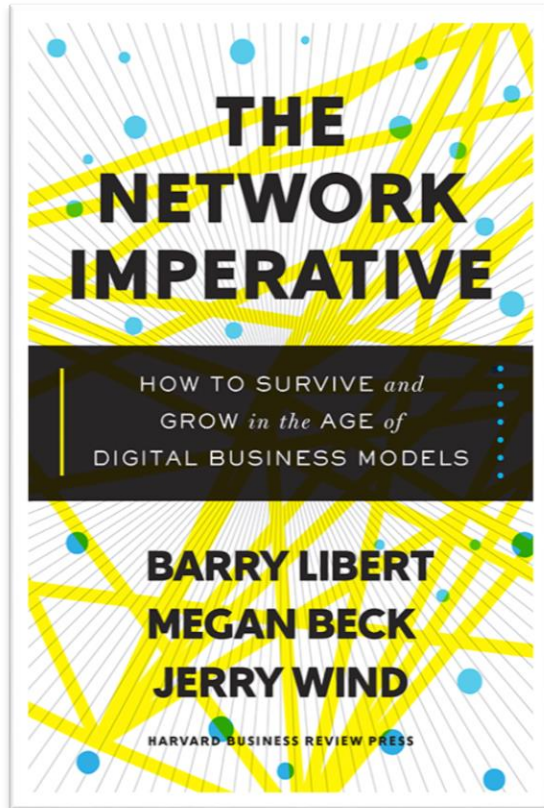
Stay standing if...

Highly engaged consumer relationships

AI powered personalized offers

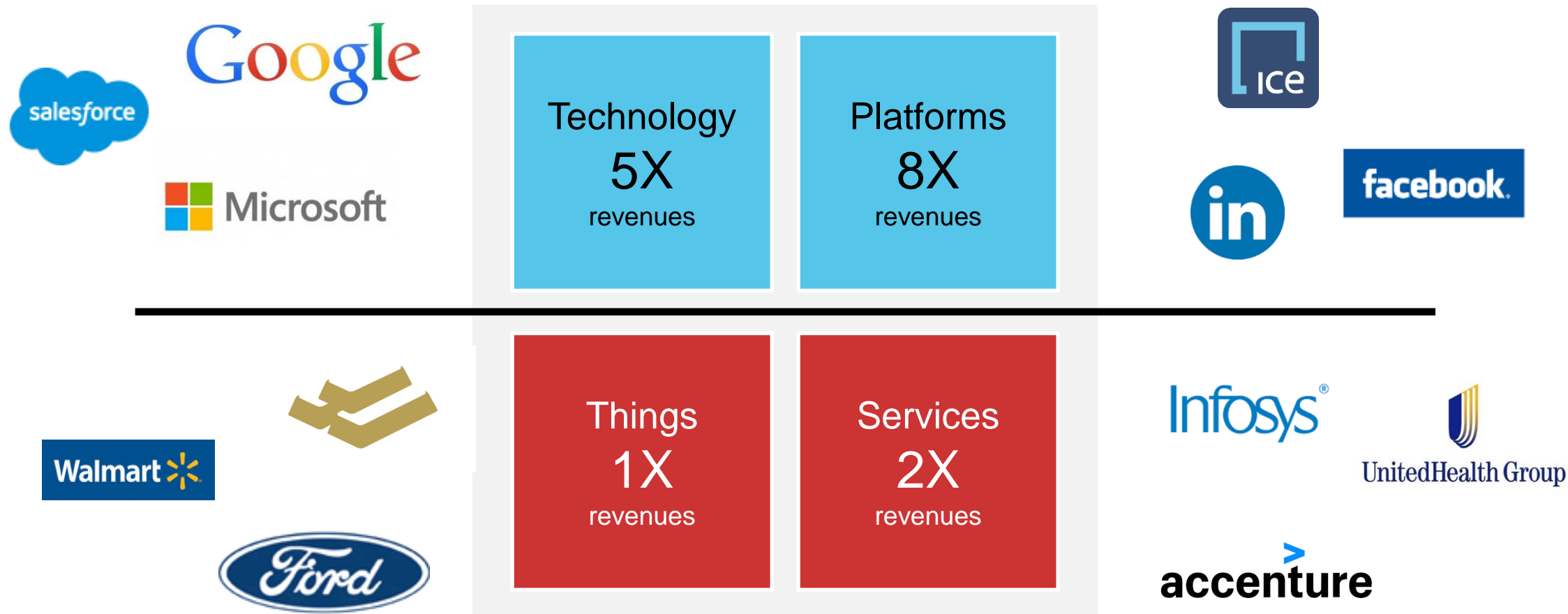
True platform business

It's a winner-take-all economy

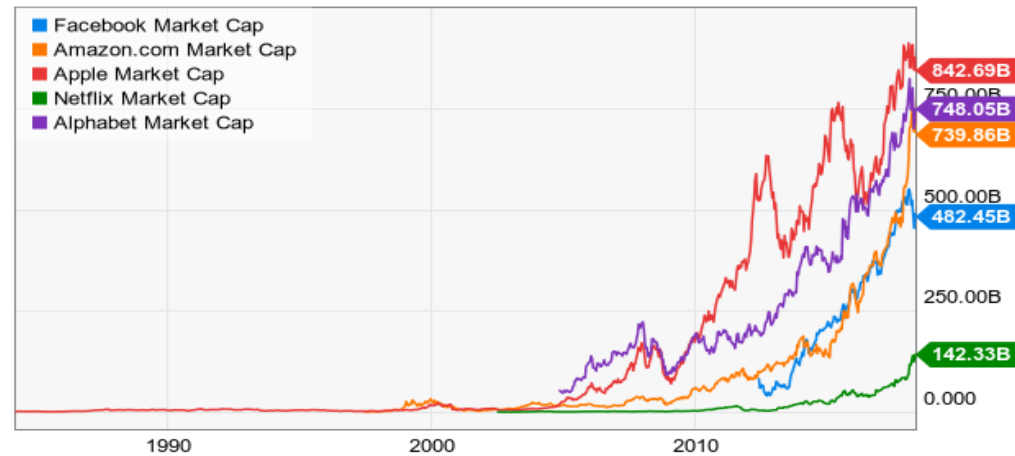
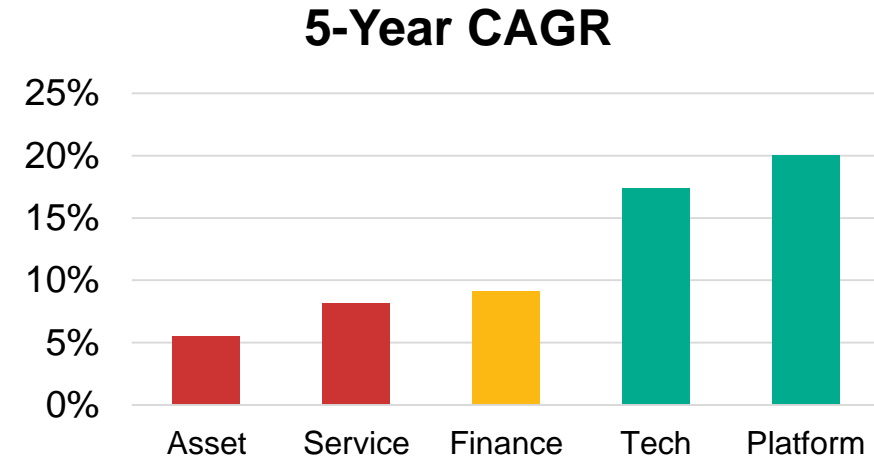
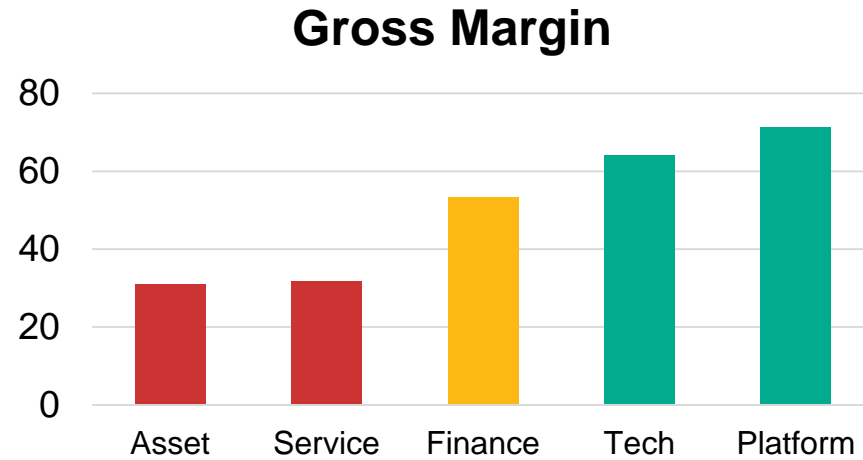


Source: Data from Thomson Reuters Eikon, May 2017

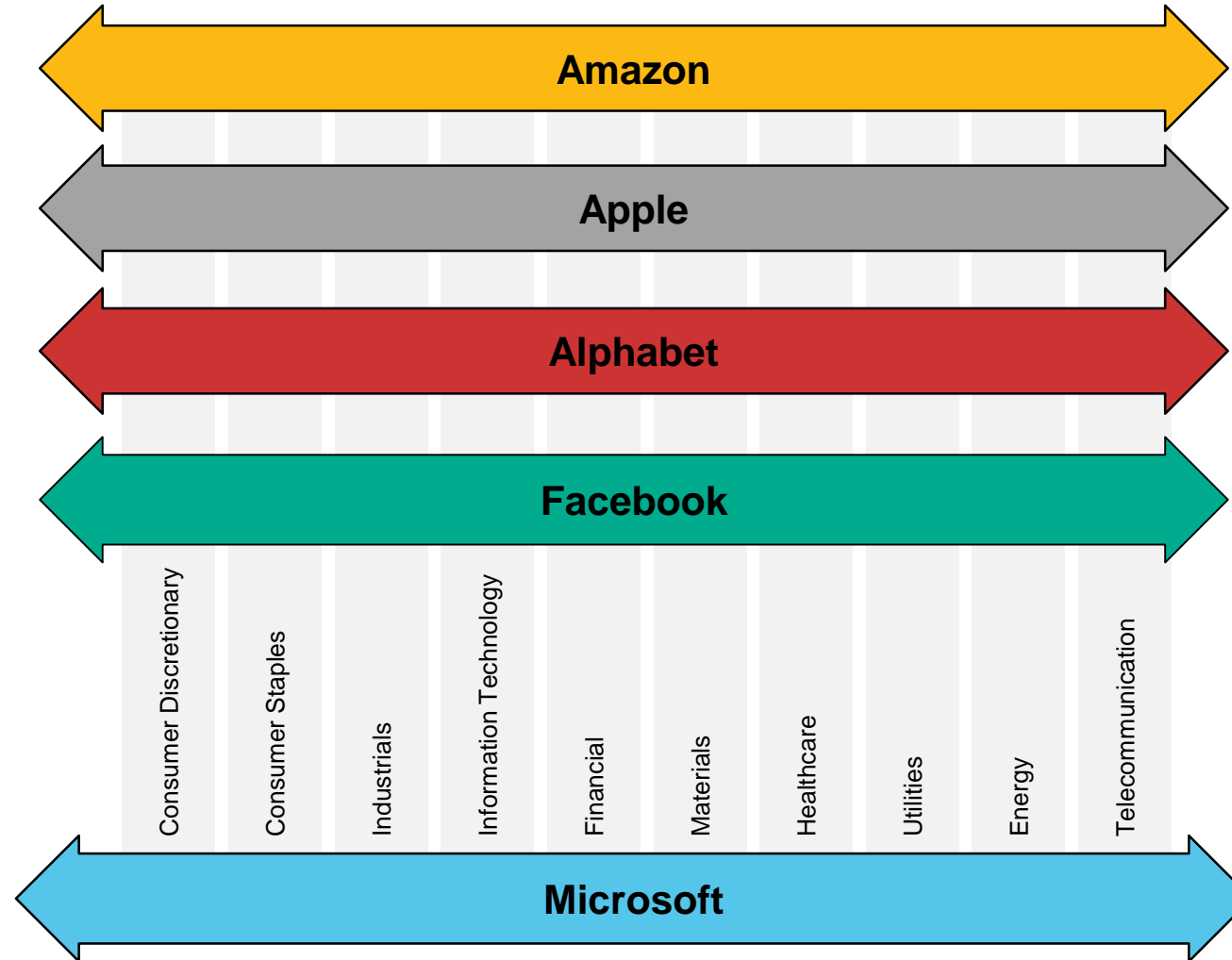
Different business models, different valuations



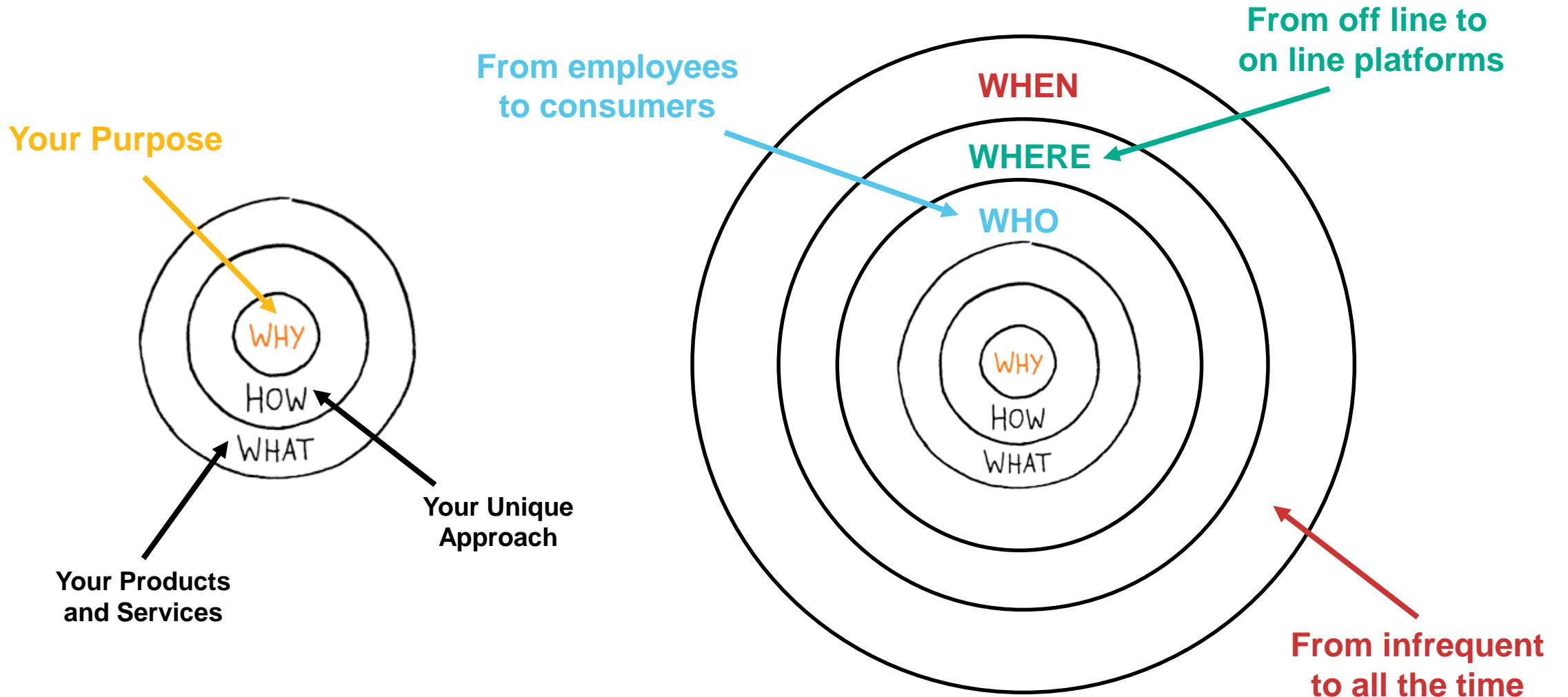
And different results...



Next Up: Platforms Going After All Industries



Three New Rules for Success



WHO and WHY Both Matter

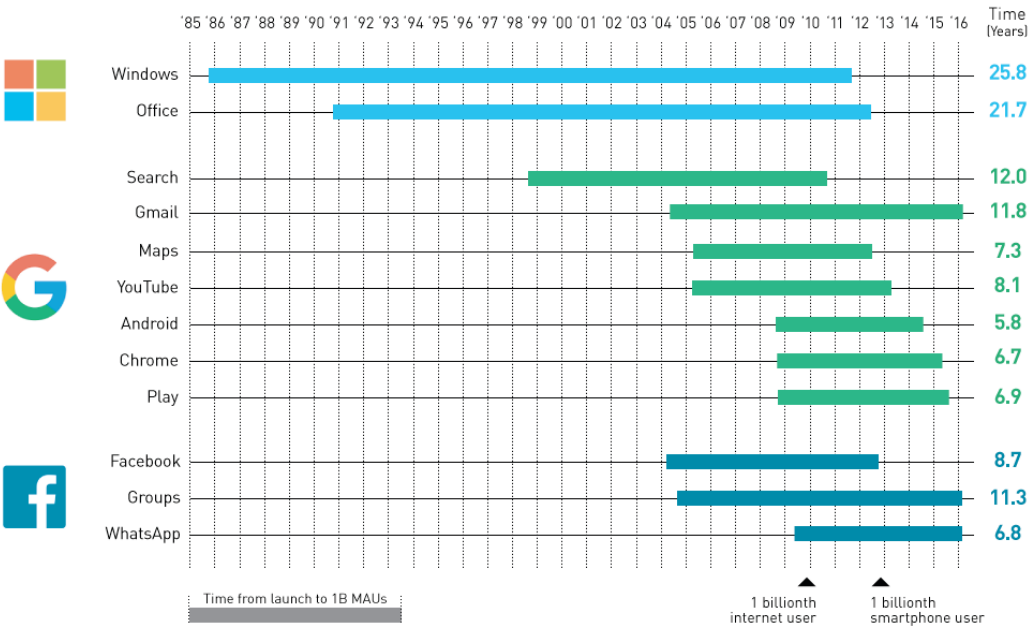


Platforms Obsessed with WHO Growth

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.

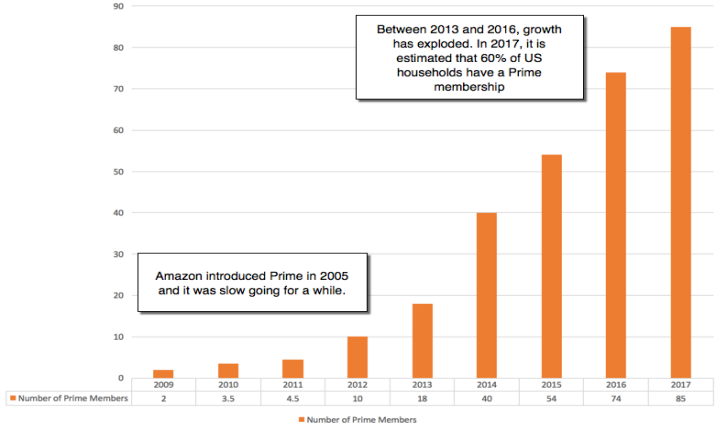


*In June 2012, Office claimed that it had over one billion users globally - not clear if they were MAUs.

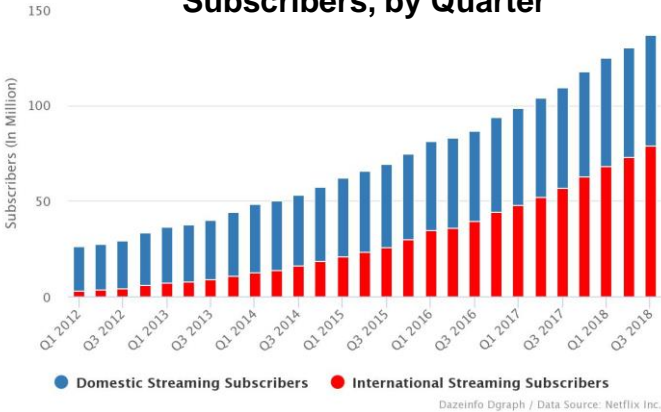
visualcapitalist.com



Number of Prime Members



Number of Netflix Streaming Subscribers, by Quarter



WHERE (On-Line) is the New Driver

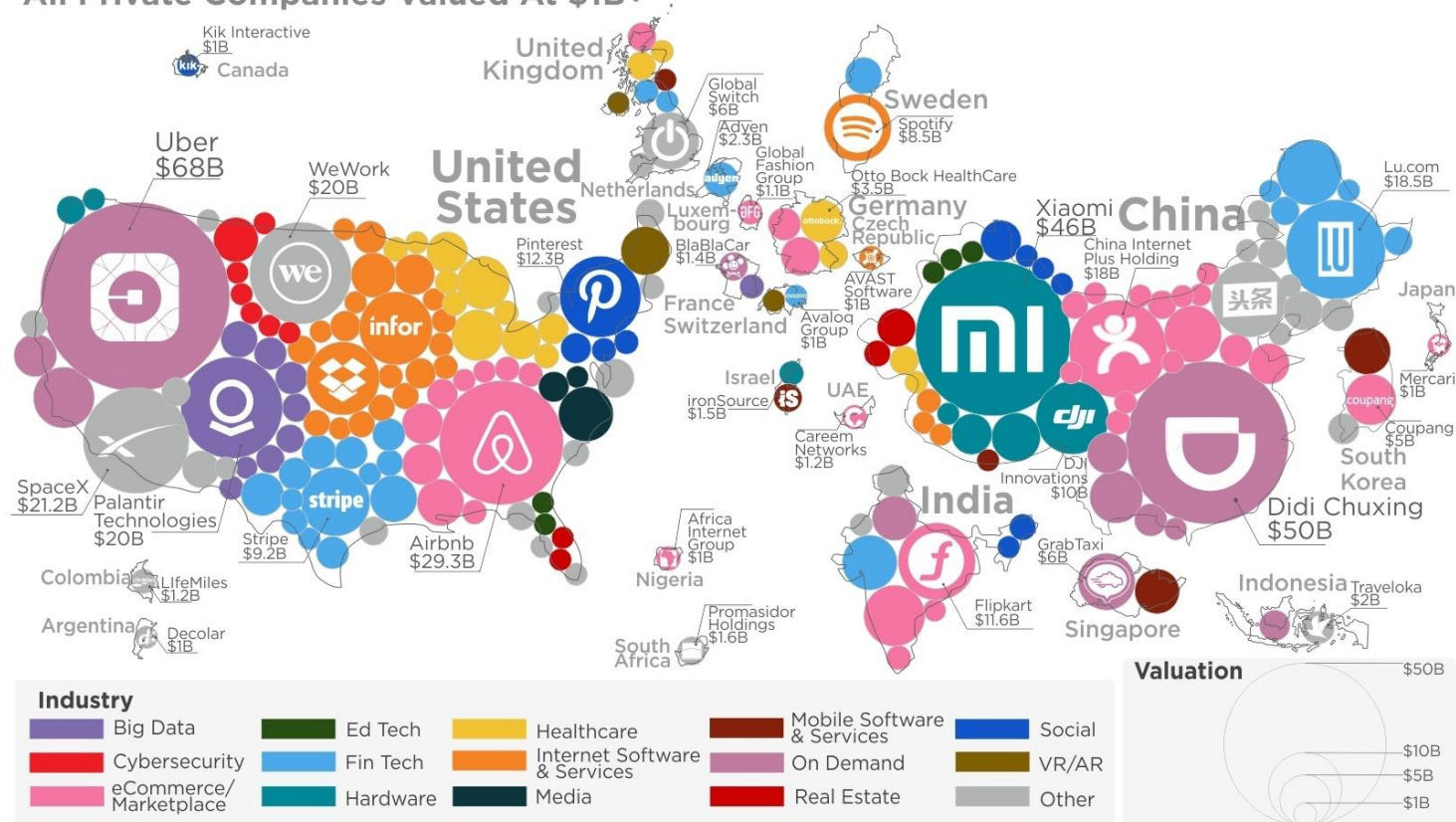
THE MEDIUM IS THE MESSAGE

THE TECHNOLOGY THAT
'COMMUNICATES' CHANGES US



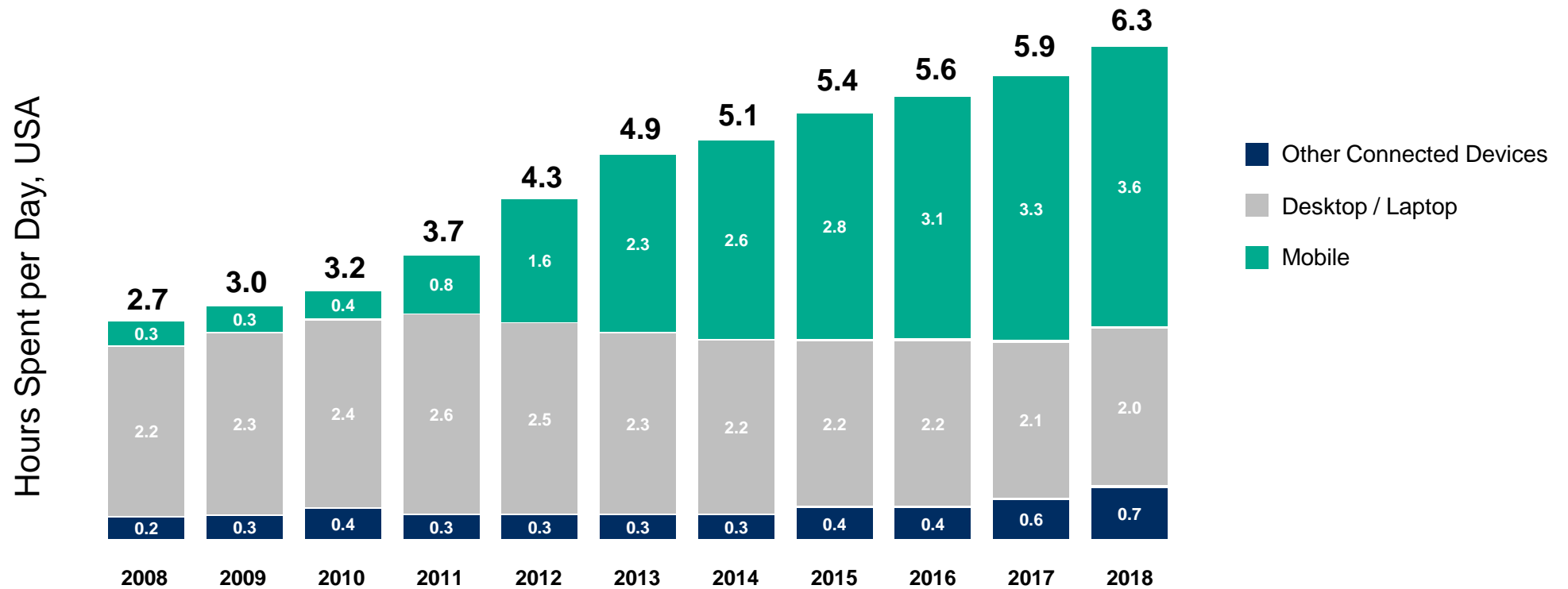
Platforms Are Emerging Everywhere

The World's Unicorn Companies 2017 All Private Companies Valued At \$1B+



In the Convenience Economy...

Daily Hours Spent with Digital Media per Adult User, USA



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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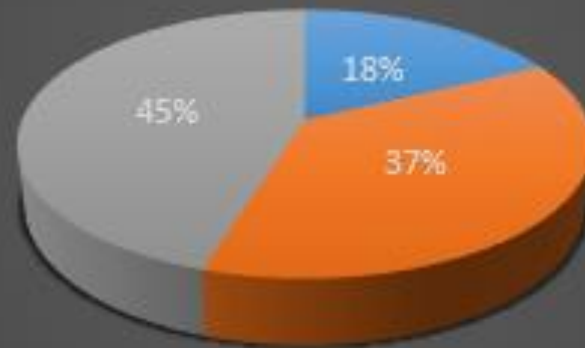
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Webinar polling results

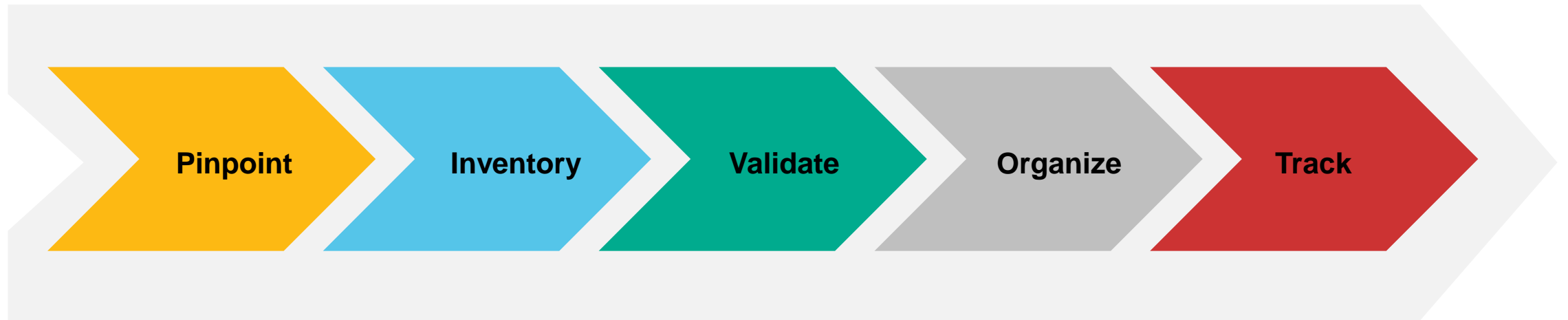
What skill sets does your organization need the most to take this journey?



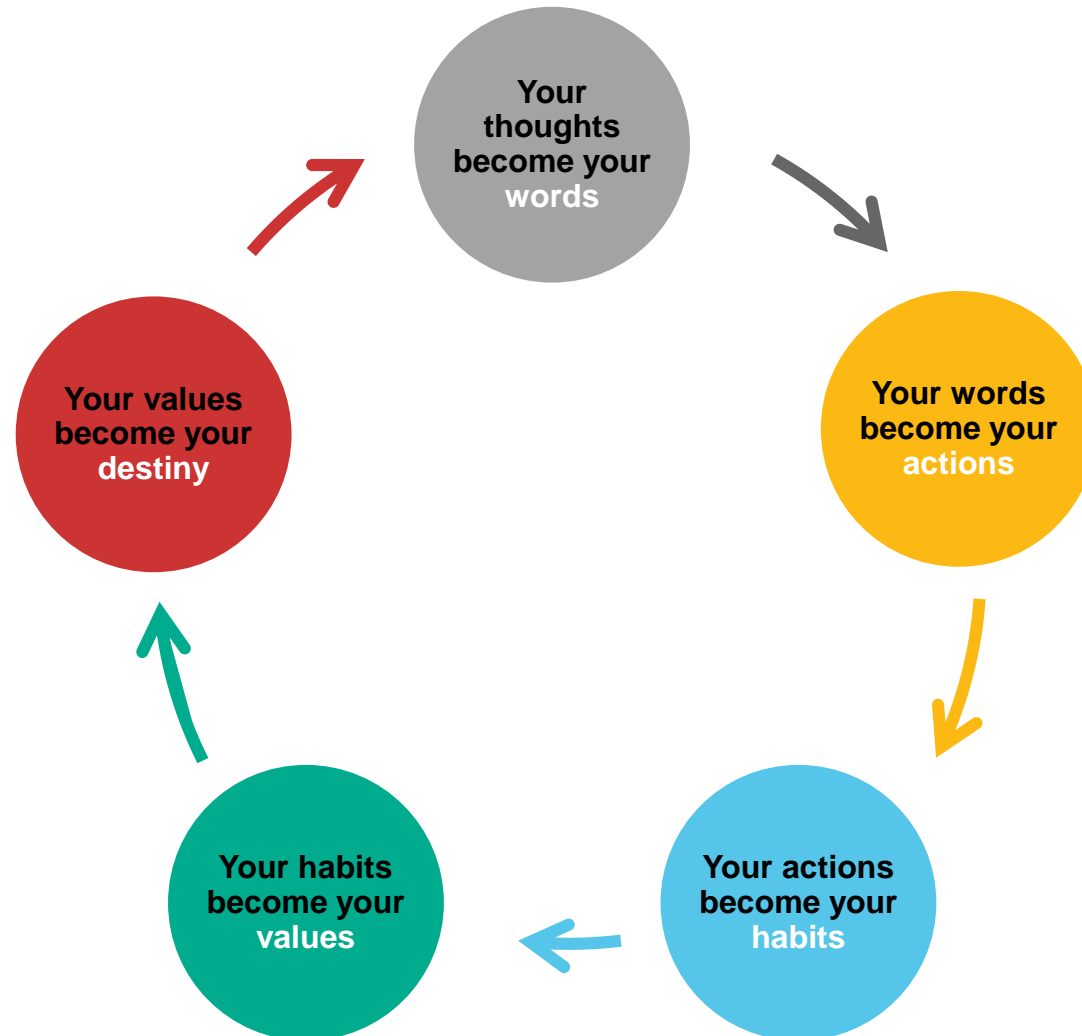
- Horizon #1: Services – Craft & Standardization
- Horizon #2: Software – Systematization
- Horizon #3: Platform – Automation

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

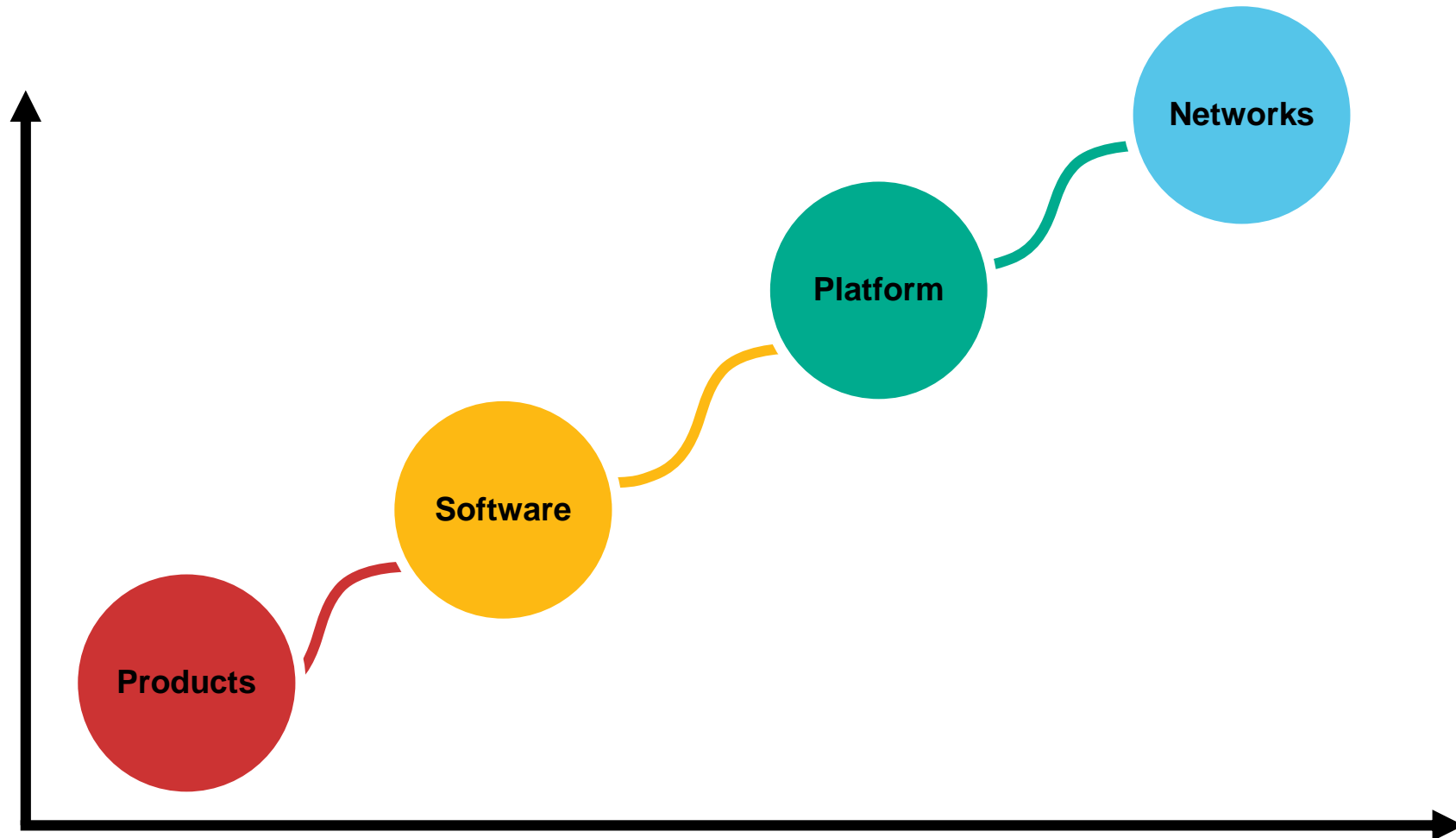
PIVOT Your Business Model



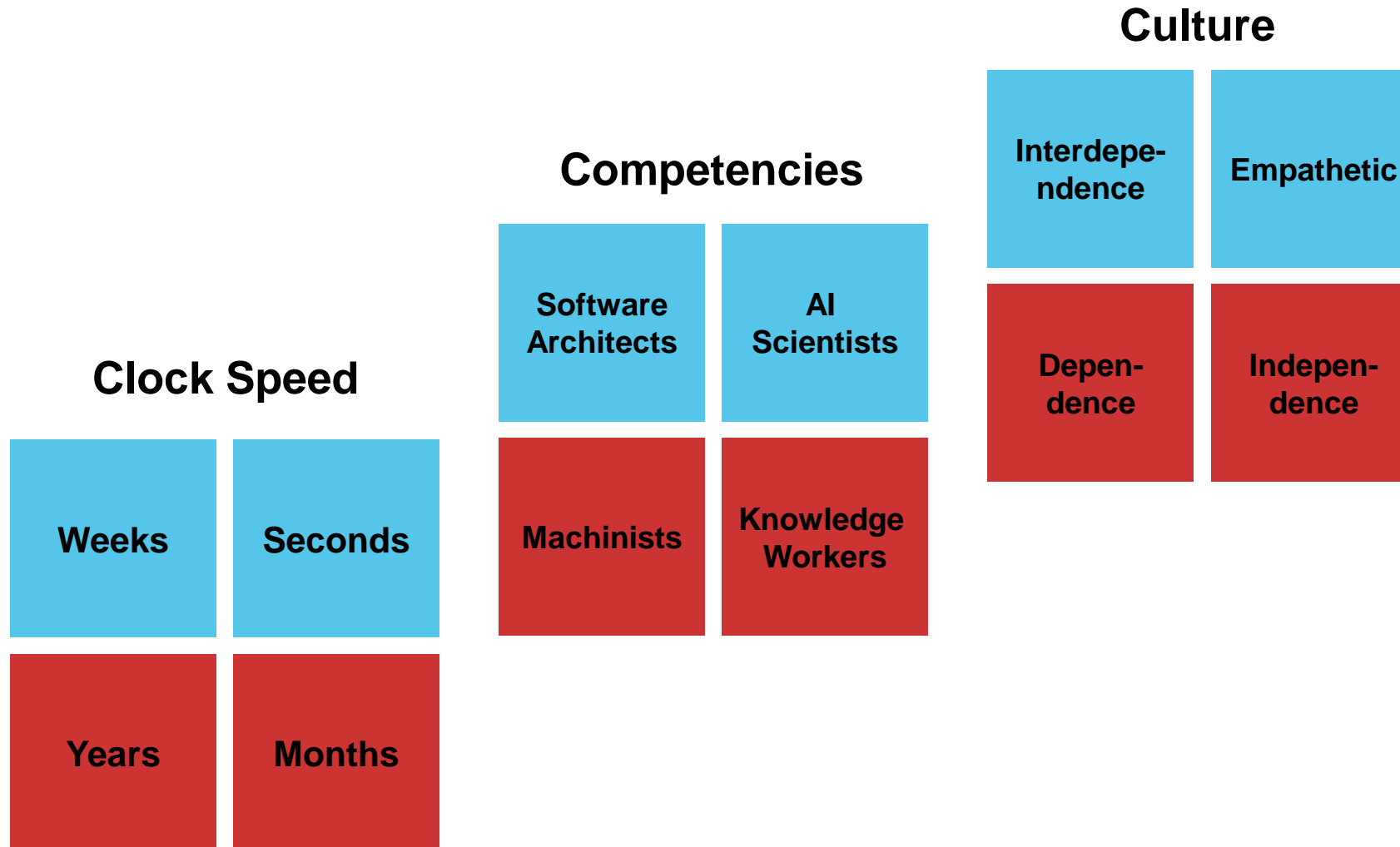
PINPOINT: Your Thoughts



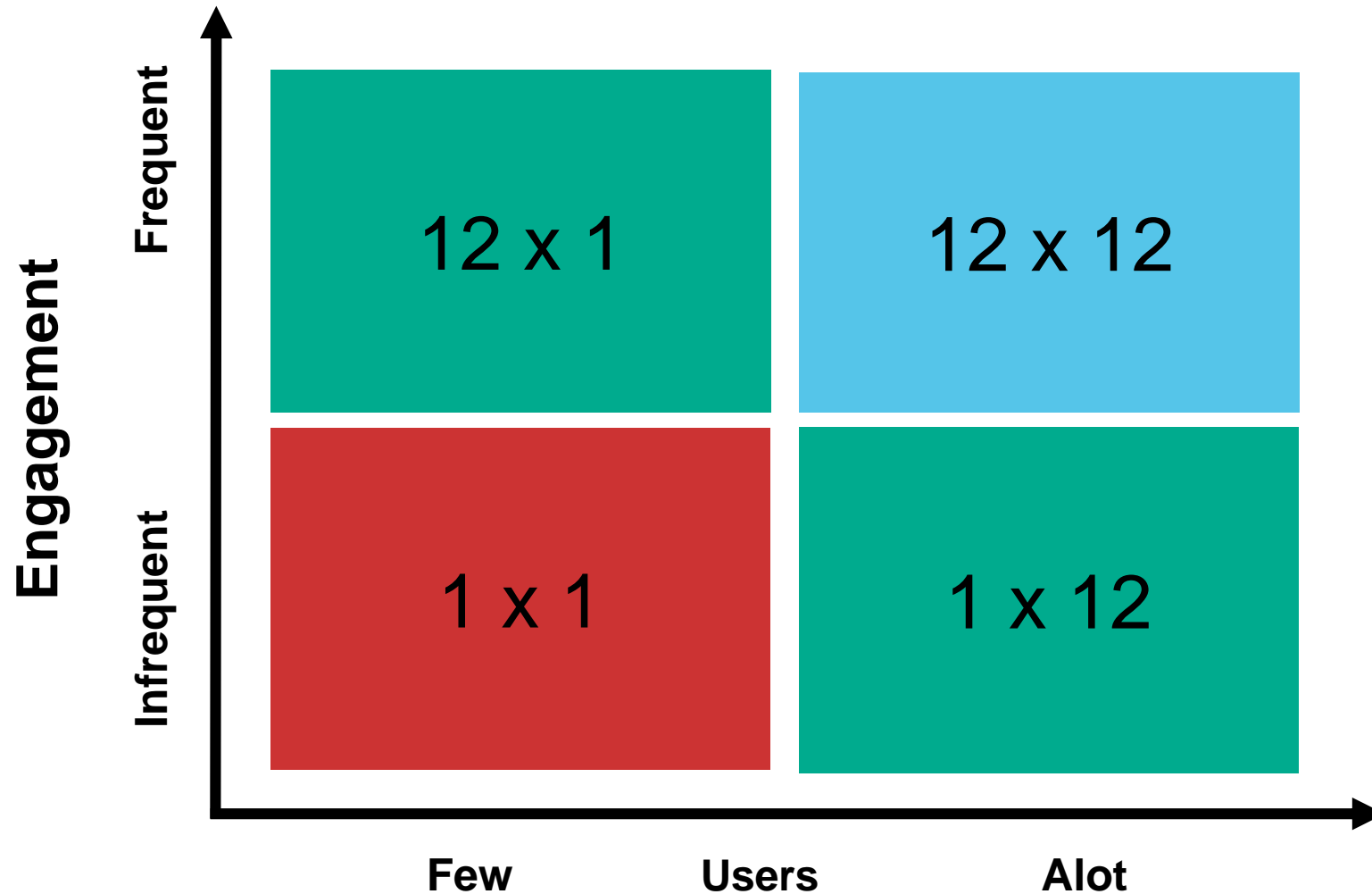
INVENTORY Your Assets



ORGANIZATION: New Skills, Speed and Culture



TRACK: How Many X How Often

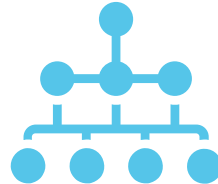


Healthcare Horizons case studies

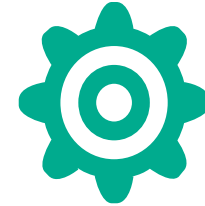
Services



Software



Platform





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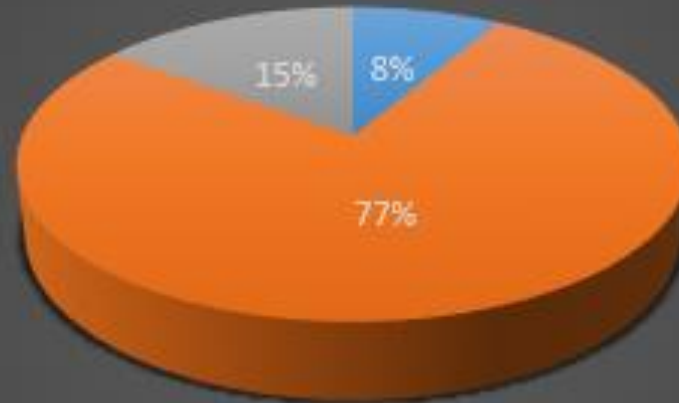
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Webinar polling results

How can Crowe help your organization be successful in this journey?



- I'd like to have a follow-up discussion on how to move across "The Three Horizons" and socialize this with key leadership
- No help is needed. We've got this covered.
- I'd like more information on P.I.V.O.T and business case examples.

- 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 low-angle shot of a person's legs in blue jeans standing on a dark asphalt road. A large white arrow is painted on the road, pointing towards the horizon. The text "Let's take the journey together" is overlaid in white on the left side of the image.

**Let's take
the journey
together**