Trends and Forces: The Shifting Landscape of Population Health Management

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WHS Offers Comprehensive Health Care Solutions to Drive Behavior Change

Core Solutions

Behavior Change Platform
A personalized health management portal based on employees' health profile that provides actionable data on incentives and potential health risks

Consumer Guidance
The “go to” destination to address all the key questions that surround healthcare decisions - plan modeling, hospital and provider look-up, treatment cost estimates, and medication advice

Lifestyle Management
Whole-person coaching, online planners, proactive messaging, and tobacco cessation programs for when employees are ready to make a health change

Condition Management
Obesity-focused coaching with online resources and progress tracking for users with a BMI of 30 or greater
Top 10 Trends Influencing Our Strategy

1. **Health Care Reform** – passage of the Patient Protection & Affordable Care Act will drive new users of the health care system, investment in HIT, growth in Medicaid, and wellness/prevention incentives – creating new opportunities for public sector and small/midsize business.

2. **Demand for ROI & Value** – evolution toward proving value for services delivered. Requires clear methodology & research.

3. **Value-based Benefit Design** – designing benefits with financial incentives that drive behavior.

4. **Clinical Data Integration** – integration of clinical data from biometric devices, screening, claims, meds and lab results to drive personalized health management solutions.

5. **Consumerism** – growth of CDHPs, HSA accounts, healthcare financial services, demand for quality & cost transparency – all driving toward a retail-like health care marketplace.
Top 10 Trends Influencing Our Strategy

6. **Mobile Health (mHealth) Trends** – growing use of cell phones and mobility strategies in health management

7. **Social Media & Virtual Media**– the growth of both social media & virtual media in the health care context will continue to grow, creating new engagement opportunities and social connections for health management.

8. **Convenience Care Models** – on-site wellness & care clinics at employers, web-based and telephone-based clinical care delivery, retail locations

9. **Patient/Physician Connectivity**– as PHR & EMR adoption grows and data integration standards solidify (CCHIT, CCDs, etc.) new opportunities will emerge for creating connections between patients, their physicians and health management providers

10. **Aging of America**– as Baby Boomers retire in the coming years, there will be enormous demand for new end-of-life and senior health management solutions.
The Industry Is At An Inflection Point, WebMD Will Continue To Innovate

- Engage consumers more directly and more regularly through efficient, multi-channel communications and personalized experiences
  - Mobile Capabilities
- Leverage the psychology and science of behavior change to activate consumers and drive targeted health improvement actions
  - WebMD Digital Health Assistant℠
- Support the shift toward value-based program design through integrated rewards and incentives, and by incorporating decision support resources alongside relevant coverage and healthcare options
  - Incentives & Rewards
- Integrate clinical data in behavior change programs to drive outcomes-based interventions throughout the care continuum and foster a comprehensive view of health
  - WebMD Health Concierge℠
- Utilize technology and more cost-effective delivery models to drive wellness and prevention in new settings, among new stakeholders, but with the consumer “at the center”
  - Condition Management (Obesity & Diabetes)