

Digital Transformation of Healthcare

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Prepared for
January Leadership Conference | January 18, 2021



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51 HOSPITALS	1,085 CLINICS	AK PROVIDENCE Health & Services Alaska	WA PROVIDENCE Health & Services Western Washington including Swedish Health Services and Pacific Medical Centers	SWEDISH pacific medical centers	MT PROVIDENCE Health & Services KADLEC Eastern Washington/Western Montana, including Kadlec Regional Medical Center
119k CAREGIVERS	38k NURSES	OR St. JosephHealth Northern California (Humboldt, Napa, Sonoma Counties), including St. Joseph Heritage Healthcare	CA PROVIDENCE Health & Services FACEY Medical Foundation Southern California (Los Angeles County), including Facey Medical Foundation	OR PROVIDENCE Health & Services Oregon Providence Health Plan	NM St. JosephHealth
1.2m HOME HEALTH VISITS	HIGH SCHOOL NURSING SCHOOLS & UNIVERSITY	CA St. JosephHealth Southern California (Orange, High Desert and San Bernardino Counties), including Hoag and St. Joseph Heritage Healthcare	TX St. JosephHealth CovenantHealth West Texas/Eastern New Mexico, including Covenant Health and Covenant Medical Group		
5m UNIQUE PATIENTS SERVED	16 SUPPORTIVE HOUSING FACILITIES				
25k PHYSICIANS	2.1m COVERED LIVES				

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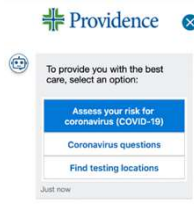
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Providence Digital COVID Response

EDUCATE
COVID-19 HUB



ASSESS
COVID-19 CHATBOT
(GRACE)



TRIAGE
EXPRESS CARE
VIRTUAL



MONITOR
AT-HOME
TWISTLE & HEALTH



TEST
CENTER
AGGREGATION



OPTIMIZE
DEXCARE



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Digital Innovation & Providence Ventures | Model & Value Drivers

health **WILDFLOWER** **dexcare**

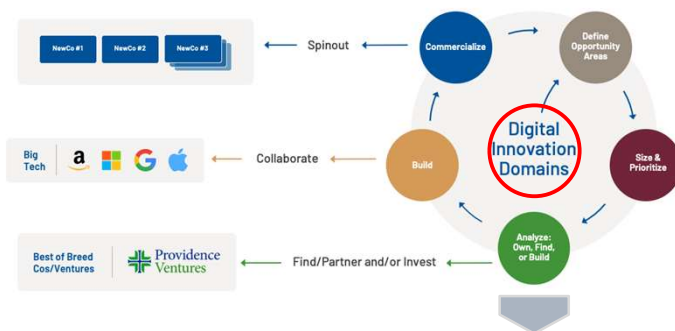
DIGITAL INCUBATOR

- Builds new solutions in the digital "white space"
- Commercialize and then spin out

one medical **lyra** **omada** **KYRUUS** **PRESS GANEY**

PROVIDENCE VENTURES

- 18 active portfolio companies
- Five "unicorns"



DIGITAL STRATEGY

- Identifies needle-moving opportunities in collaboration with Providence LOBs, regions
- Finds enabling technologies to support (Twistle, SilverCloud)
- Identifies white space for Digital Incubation



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Digital Insights

AUDIENCE

30% of Contacts = C-Level

60% = Director and Above

AREAS

Transformation
Innovation
Strategy
Technology
Risk Management
Communication
Finance
Marketing
Research
Academics
Consultants & Analysts
Information Systems

ORGANIZATIONS

AHA
Allina Health
Amazon Care
AMA
Anthem
Ascension
Banner Health
Bill & Melinda Gates
Blue Cross & Blue Shield
Boston Medical Center
Cambia Health
Cerner
Cigna
Cleveland Clinic
Columbia University
Dartmouth College
Deloitte
Flare Capital
Gartner
GE Healthcare
Google

Highmark
IBM
Intermountain Health
John Hopkins
Johnson & Johnson
Kaiser Permanente
Live Oak Partners
Livongo
Mass General
Madrona Ventures
Microsoft
NCQA
Oliver Wyman
Optum
Penn State Health
Stanford Health
The Governance Institute
US News & World report
UC Berkeley
UCLA Medical

DIGITAL INNOVATION & INSIGHTS

Journey Toward the Next Normal



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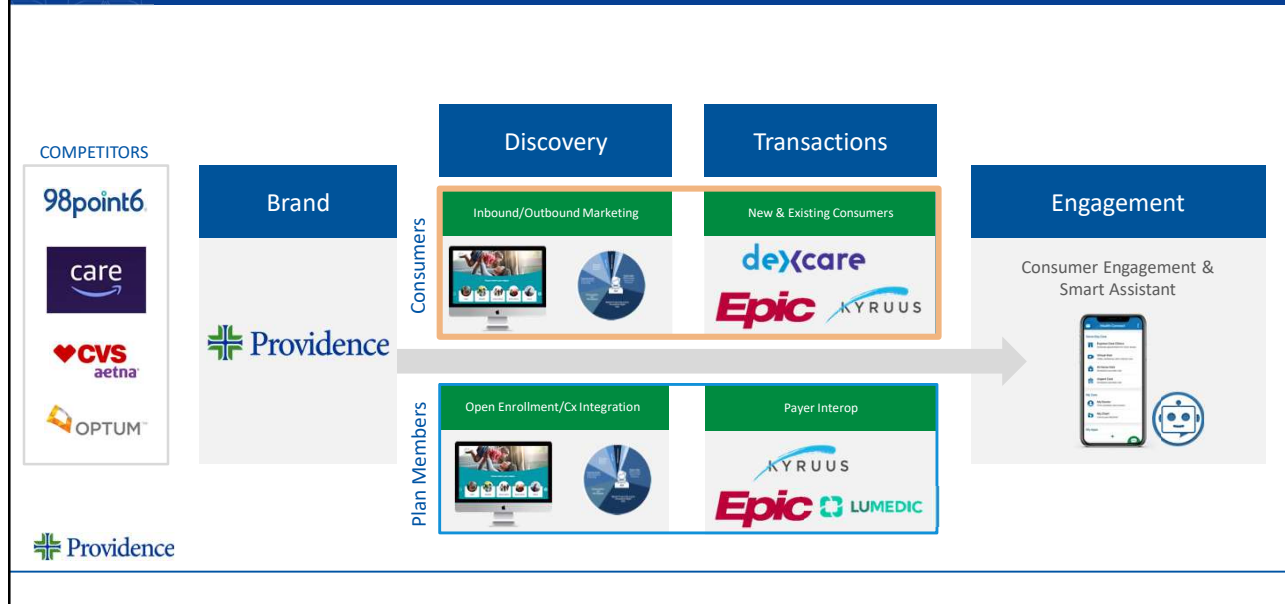
The Health System Digital Challenge



OPTUM™

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Consumer + Plan Member | Integrated Digital Platform



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Marketing & Digital Experience | Value Drivers

Marketing

Via attributable outbound high-acuity commercial procedure campaigns, using the Consumer Data Platform (CDP)

6-10:1 Return on Marketing Investment

Digital Experience

Delivered the fastest-growing, largest digital channel for new, high-value patients for low-acuity care

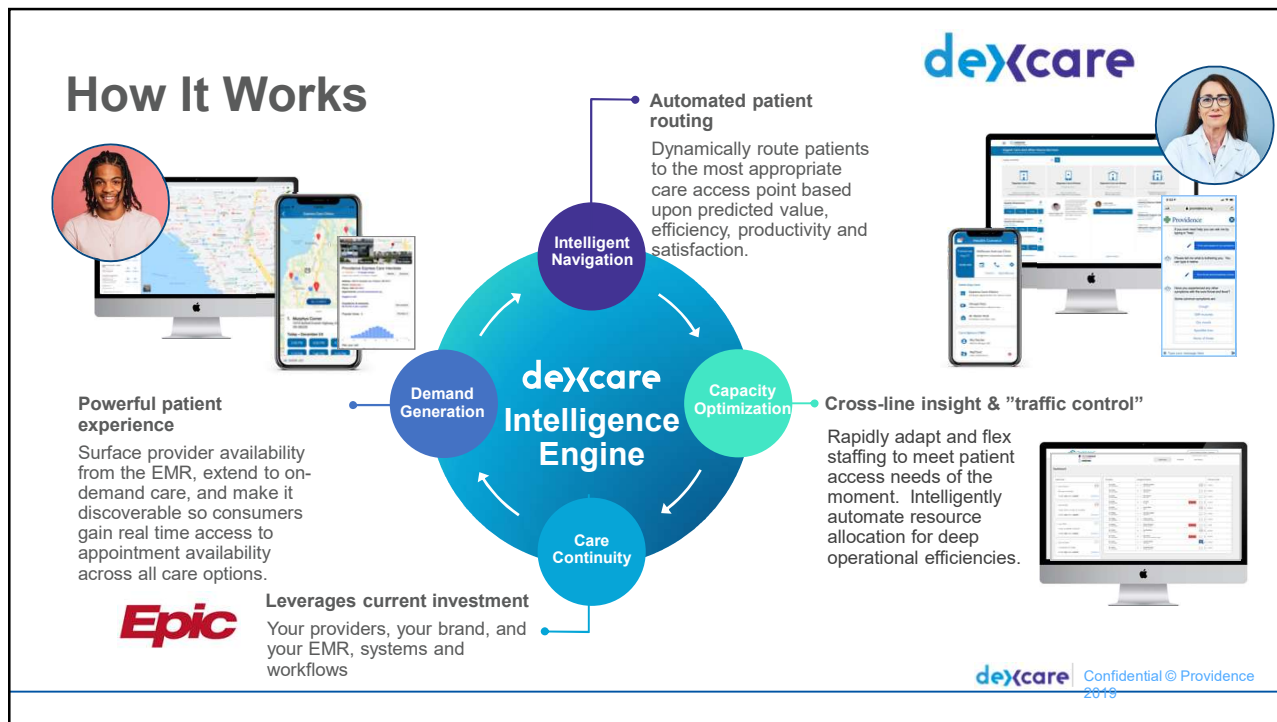
- +78% y/y for DIG platforms 2019.
- New DIG channels are now >60% of all digital transactions.
- 73% commercial, 30% new patients

LTV: Three-Year \$4,400 Revenue

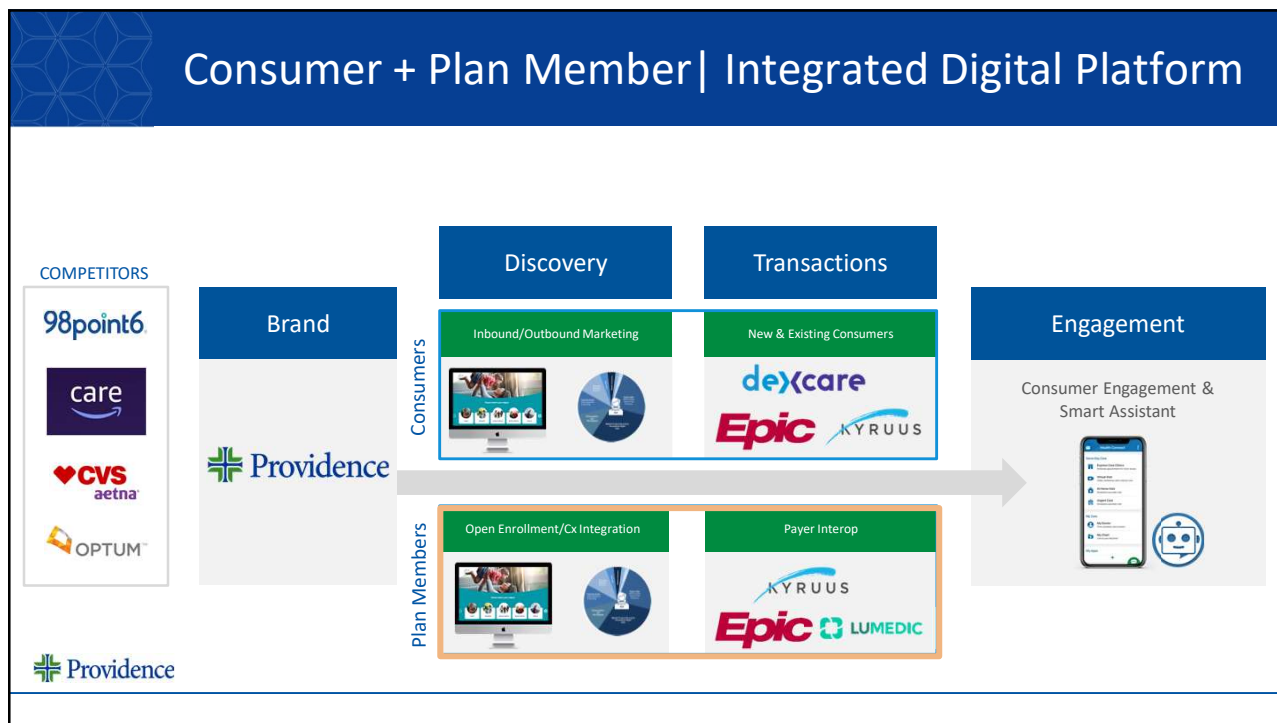
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Notes: ROMI=Return on Marketing Investment, NPS=Net Promoter Score, CAC=Customer Acquisition Costs, MOIC=Multiple on Invested Capital, LTV = Lifetime Value

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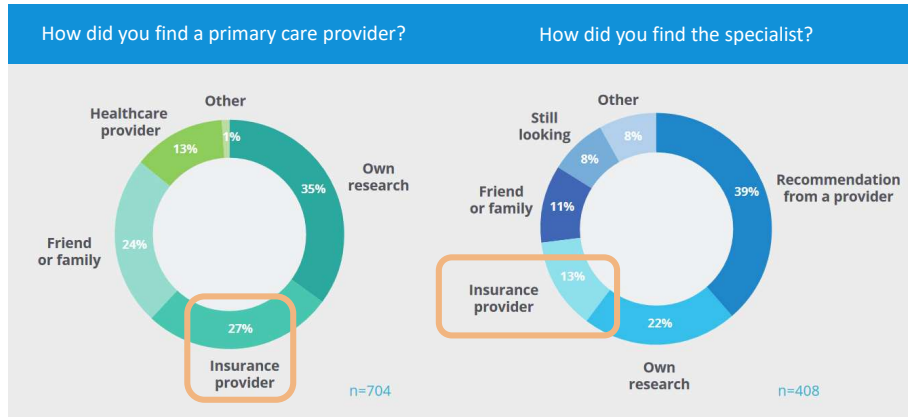


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After Google (Consumer), Payer Digital Experiences are How Consumers Find Care

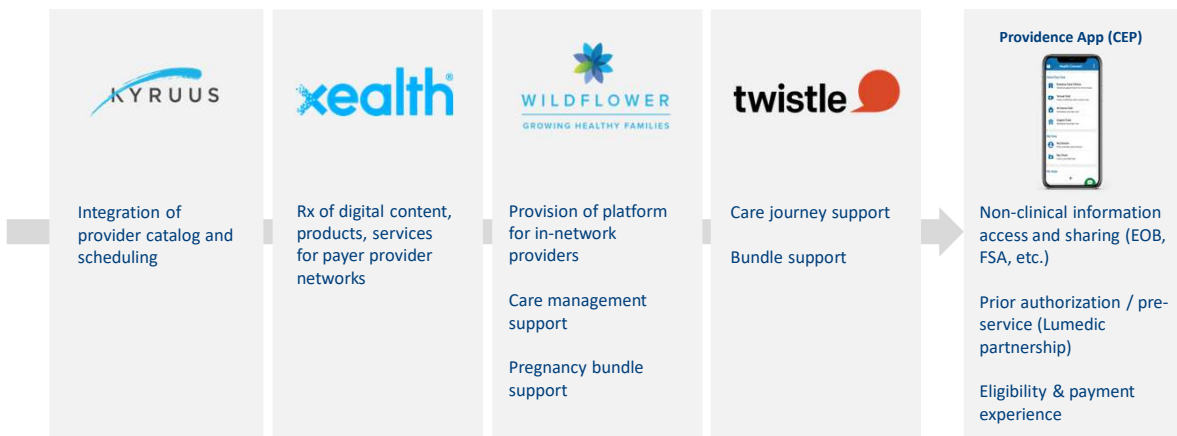


Source: Kyruus 2020 Patient Access Journey Report



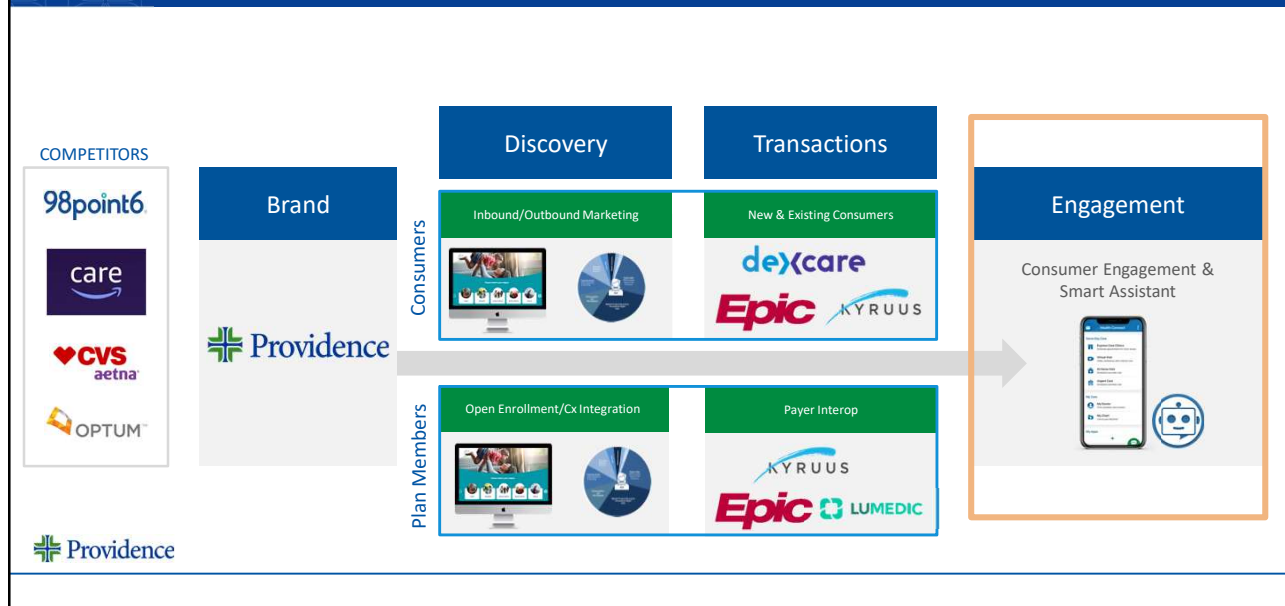
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Payer-Provider Digital Integration | Near-Term



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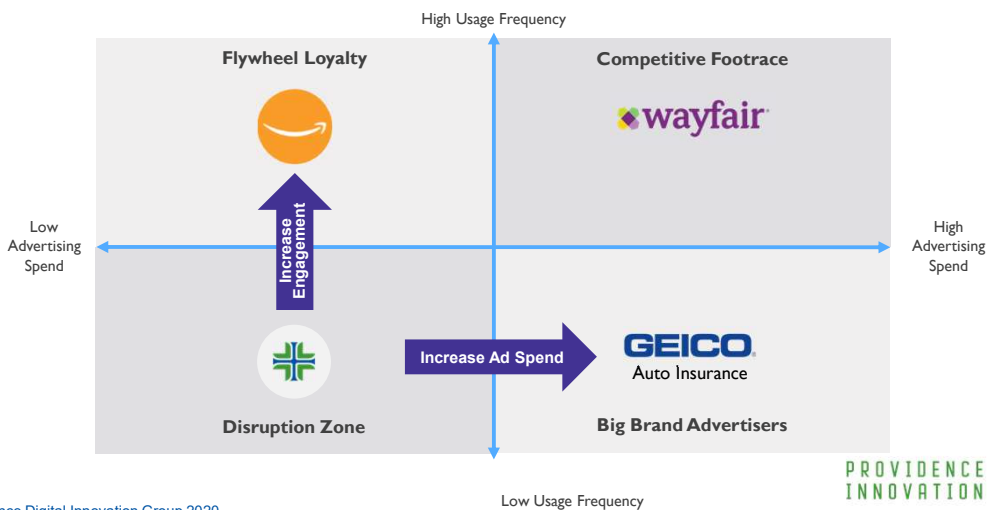
Consumer + Plan Member | Integrated Digital Platform



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Consumer Engagement

Health System patient engagement is low, making the industry ripe for disruption.



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Consumer Engagement: Retaining Consumer & Reducing Churn

High-quality engagement before, after, during and in-between episodes of care increases retention, LTV capture & brand loyalty.

Source: DIG strategy team fall 2019 analysis

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Consumer Engagement Platform (CEP)

INTELLIGENT NAVIGATION THRU

- Flexible, customizable experience
- Multi-modal access (chat, voice, SMS)
- Real-time personalization

Unified Access Point

ORCHESTRATION

PERSONALIZATION

Navigation

Engagement

UNIFIED ACCESS TO SERVICES ACROSS

- Business lines
- 3rd party innovations/apps/content
- Thru SSO or deep integration

ENGAGEMENT

- Within & between care episodes
- Real-time personalization
- Predictive & proactive

Communication
(Messaging, Notifications)

Data
(EMR, CDP, Behavioral/ Analytics, IOT, Content)

Payment
(Self-pay & Insurance, Transactional & value-based)

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CEP | Access and Navigation Drives Engagement While Accessing Market Innovation

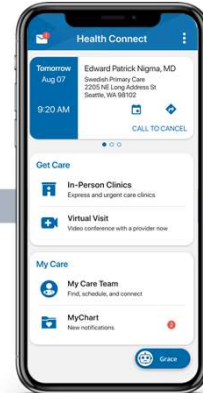
Consumers need to know what's available, what to trust, how much they need to pay and access them easily

Unified access, easy navigation through their provider trusted app



SSO & Deeper integrations

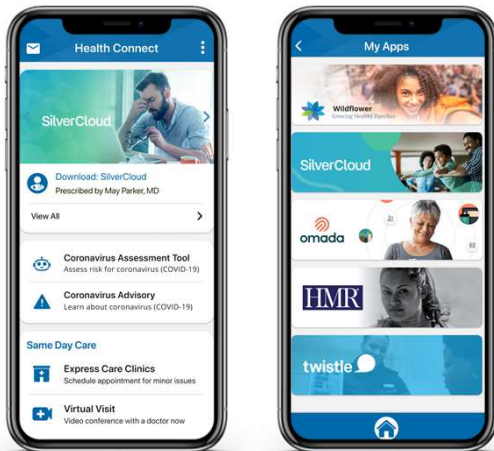
Integrations across Payer/Provider/Employer 3rd-party trusted innovations



"Digital Formulary"

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Unified Access | 3rd Party Innovations Integration



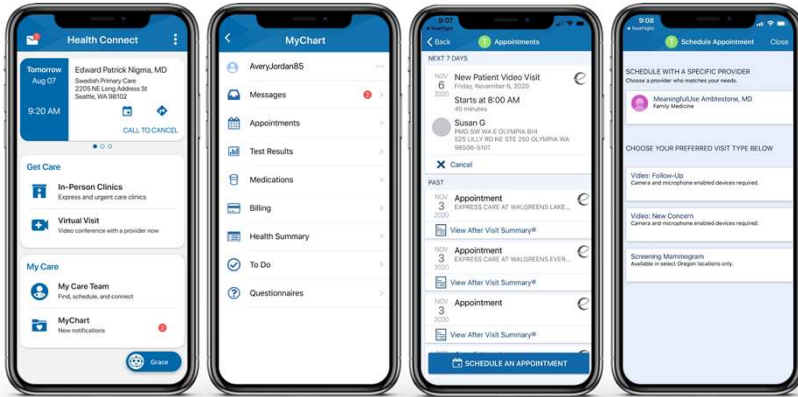
Providers can prescribe 3rd party applications to their patients—allowing the provider to treat the patient holistically

The Health System can expose the breadth of services and partnerships to their patients



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Unified Access | MyChart Integration



MyChart Integration into mobile application

Thru SSO, MyChart is an integral part of the platform

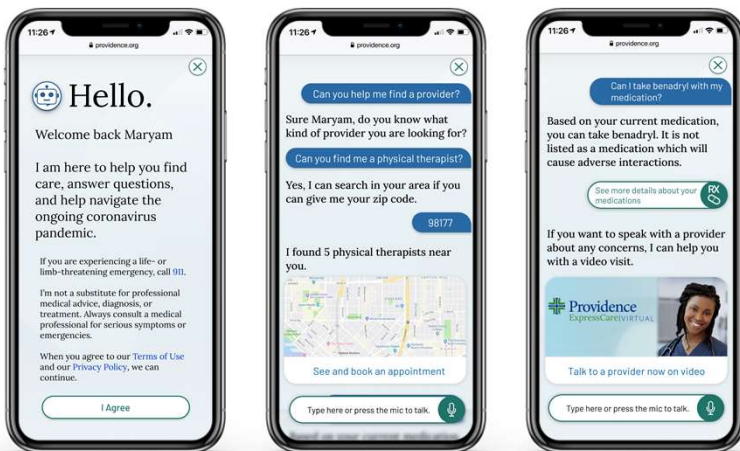
Patients can take advantage of all services that are served through MyChart

Can deeply integrate high volume features into app via API/SDK for better Cx



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Navigation | Conversational Grace



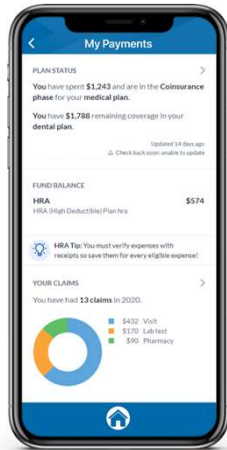
Engage with patients empathically via natural user conversation

Based upon needs, Grace navigates the patient seamlessly to the care that best fits their needs



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Payment | Payer Integration and Benefits Overview



Regardless of the patient's insurance plan, we can display plan and fund status—allowing the patient to have a transparent view in managing their expenses

Display digital insurance card (Lumedic), integrated plan information, etc.

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Questions/Discussion

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