

**Culbert**  
HEALTHCARE SOLUTIONS

**Alternative Front Doors to Healthcare**

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Improving Patient Care

Enhancing Patient Experience

Driving Financial Performance

# Consumerism on the Rise

## McKinsey, Deloitte, PWC Surveys

Consumers are starting to want same type of value in healthcare as they expect from other strong consumer companies



Consumers want great customer service (healthcare and non-healthcare alike)

- Deliver on expectations
  - Access
  - Get information
  - Choice
- Make life easier
- Offer great value - expectations are being set by non-healthcare industries

# Empowerment: The Digital Age for Engagement



## Information Access

Medical Information  
Navigation

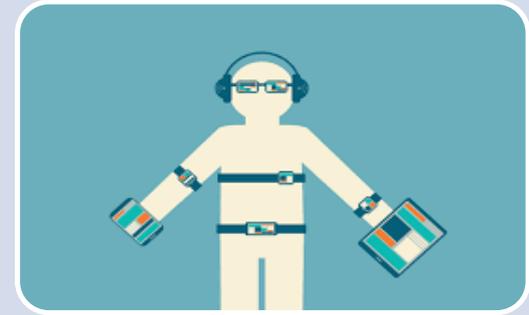


## Access Care

### TELEHEALTH

### Chronic Conditions:

Diabetes  
Hypertension



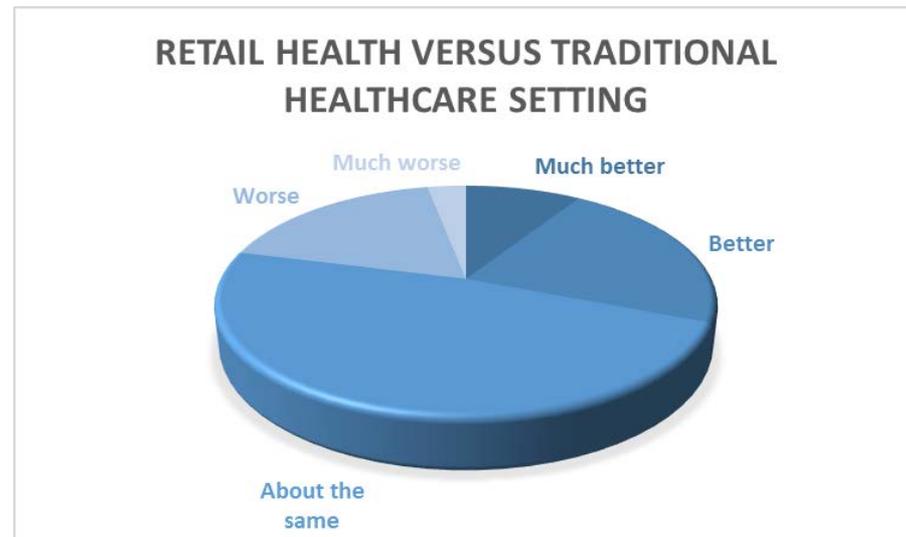
## Fitness and Wellness

79% willing to use  
wearable health device  
*Fitbit \$1.9B in 2015*

# Access: Alternative Front Doors-When Loyalty Wanes

## RETAIL HEALTH

- Value Proposition
  - Access: 7 days/wk, evenings/weekend/holidays, no appointment necessary
  - Convenience – in CVS, right in community, visit and medications
  - Value: price transparency, low cost
- Experience
  - 79% found the clinical experience the same OR BETTER
  - 95% Press Ganey Satisfaction
- Growth
  - MinuteClinic – 400-1,100 clinics in 6 years
  - 2 million to 6 million patients in 6 years
  - All age groups, slightly younger than traditional healthcare



## Growth of Telehealth and Urgent Care

# Access: The Pharmacist Will See You Now

## CVS

- Eliminate the sale of Tobacco
- Provide Smoking Cessation Support

## Prescribe Contraception

- Oregon, California, Colorado

## Narcan

## Additional Services

- Vision, Audiology
- Phlebotomy

## What's Next

- Chronic Care?



# Healthcare Disruption

- Health systems beware that they may be disrupted:
  - Patients are becoming more empowered
  - Digital health is proliferating
  - Healthcare more than episodic physician visits
  - Patients are sharing the cost burden
  - Patients are looking for alternative care services
  - Care may become a commodity