2018–2019
Health Care Advisory Board National Meeting Series

Thriving Under Pressure: Securing future growth in a rapidly restructuring market

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advisory.com/hcab/2018meeting
Delivery System Reform Circa 2019: The Private Sector Is Now the Pace Car

In a major market switch, private-sector players—not policymakers—are now pushing hardest to extract more value from the health care delivery system. Employers, retailers, and health plans are searching for disruptive solutions to bend the spending curve. At the same time, mega-mergers and a new wave of vertical integration are creating different-in-kind delivery systems. On the public-payer side, states and the federal government are picking up cues as to what works—and embedding those mechanisms into provider reimbursement and regulation.

This year’s research unpacks the most important forces reshaping the health care industry and provides guidance on how to stay a step ahead.

No hospital or health system leader can afford inaction amid a rapidly restructuring market.

Medicare Volumes **Out-Migrating**

*Cumulative Change in Annual Utilization, 2006–2016*

- Outpatient: 49.0%
- Inpatient: -21.8%

Commercial Volumes **Stagnating**

*Cumulative Change in Annual Utilization, 2012–2016*

- Outpatient: -0.4%
- Inpatient: -13.0%

Unlocking New Growth Opportunities

Not only is the marketplace complex and full of new entrants, but purchasers also increasingly seek to commodify our core business—acute care—and per capita demand is falling. Hospitals and health systems need sharper, less conventional, and more holistic growth strategies. Merely recruiting more physicians, investing in more services, or even opening more clinics will not suffice.

To secure future growth, hospitals and health systems must win on three fronts:

1. **Re-ignite the growth engine**: How can we sharpen our overarching growth strategy to both successfully chart our own course and respond to moves by competitors?

2. **Invest in the service lines of the future**: What must we do today to build the winning orthopedics, neurology, cardiology, oncology, and women’s service lines of tomorrow?

3. **Build a market-competitive ambulatory network**: How should we focus capital, partnerships, and leadership bandwidth to create the ambulatory network of the future?

Don't Overlook Expenses—Particularly Pharmaceutical Costs

To protect margins, hospitals and health systems must complement growth with sustainable cost control. Pharmaceutical spending is one area that needs attention now. Unfortunately, traditional pharmacy strategies are falling short.

What practical steps must we take to rein in pharmaceutical cost growth?
2018–2019 National Meeting Series

Meeting Agenda

The 2018–2019 Health Care Advisory Board national meeting series will help health care leaders cut through market uncertainty and update their strategies to advance mission and margin. We look forward to seeing you at these sessions.

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DAY 1: Map of the Emerging Market

12:30 p.m.  **Guest Arrival and Registration**

*Light lunch provided*

1:00 p.m.  **State of the Union—Navigating Disruption, Consolidation, and Cost Pressure**

*+ M&A beyond the headlines*: What does the recent trend toward mega-mergers and vertical integration mean for the health care industry?

*+ Cutting through the noise*: Which innovators are true disruptors and which are mere distractions?

*+ Death by a thousand cuts*: How are decelerations in price growth, increases in bad debt, and shifting utilization patterns destabilizing provider economics?

3:00 p.m.  **Re-igniting the Growth Engine**

*+ Capturing consumer preference*: Identifying the real opportunities for sustainable growth in the consumer-driven health ecosystem

*+ Growth-oriented diversification*: Evaluating how new assets and revenue streams can unlock outsized growth opportunities and replace traditional cross-subsidies

*+ Regional, national, and global strategies*: Exploring when to look beyond primary service areas for “big bang” expansion

5:30 p.m.  **Adjournment**
DAY 2: Keys to a Thriving Enterprise

7:30 a.m.  Continental Breakfast

8:00 a.m.  The State of Our Service Lines
+ The market shift factor: Predicting how clinical technologies, payment changes, and care management will impact demand
+ Appealing to selective consumers: Uncovering the make-or-break elements your programs need to succeed—and how to communicate them to the market
+ Building the platform: Investing in technologies, provider partnerships, and care model innovations to deliver the products that consumers, physicians, and payers demand

9:30 a.m.  The New Rules of Ambulatory Competition
+ From threat to opportunity: Discovering how to grow when profitable procedures move to the outpatient setting
+ Assembling the right asset portfolio: Navigating when to build, buy, and partner while constructing a comprehensive ambulatory network
+ Becoming the network of choice: Strengthening connections across integrated and affiliated assets to streamline referrals

11:00 a.m.  Reining in Pharmaceutical Spending
+ Protecting operating margins: Managing drug formularies and improving provider prescribing patterns
+ Containing total cost: Understanding pharmacy’s role in advancing population health success
+ Starting with our own employees: Inflecting pharmacy benefit spending amid the rising cost of generic, brand, and specialty pharmaceuticals

12:30 p.m.  Adjournment
Who Should **Attend**

+ **C-suite executives**: CEOs, COOs, CFOs, CSOs, CTOs, CMOs, and CNOs
+ **Strategists and planning leaders**: VPs and directors of strategy, planning, and business development
+ **Frontline leaders**: Administrative and clinical leaders at the director level and above

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**What You Will Take Away**

+ Analysis of disruptive market forces reshaping the industry and major implications for hospitals and health systems
+ Playbook for modernizing organizations’ overarching growth strategy
+ Guidance on generating growth through differentiated service line offerings
+ Framework for deploying the next-generation ambulatory network
+ Tactics for identifying and addressing cost savings opportunities in pharmaceutical spending

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**Featured Presenters**

- **Bradford Koles, Jr.**
  Executive Director
- **Stuart Clark**
  Managing Director
- **Rob Lazerow**
  Managing Director
Meeting Dates and Locations

October 15–16, 2018
Advisory Board Offices
Washington, DC

November 12–13, 2018
Advisory Board Offices
Washington, DC

November 15–16, 2018
The University of Chicago
Gleacher Center
Chicago, IL

November 27–28, 2018
The Ritz-Carlton, Laguna Niguel
Dana Point, CA

December 3–4, 2018
The Ritz-Carlton, St. Louis
St. Louis, MO

December 5–6, 2018
Fairmont Copley Plaza, Boston
Boston, MA

December 17–18, 2018
The Ritz-Carlton, Dallas
Dallas, TX

January 10–11, 2019
Advisory Board Offices
Washington, DC

January 14–15, 2019
The Bellevue Hotel Philadelphia
Philadelphia, PA

January 28–29, 2019
The Ritz-Carlton, San Francisco
San Francisco, CA

February 4–5, 2019
The Henry, Autograph Collection
Dearborn, MI

February 11–12, 2019
The Ritz-Carlton, Westchester
White Plains, NY

February 21–22, 2019
The St. Regis, Houston
Houston, TX

February 25–26, 2019
The Ritz-Carlton, Cleveland
Cleveland, OH

March 4–5, 2019
Advisory Board Offices
Washington, DC

March 7–8, 2019
Four Seasons Hotel Seattle
Seattle, WA

March 11–12, 2019
The Ritz-Carlton, Chicago
Chicago, IL

March 14–15, 2019
Loews Vanderbilt Hotel
Nashville, TN

March 25–26, 2019
The Westin Edina Galleria
Edina, MN

March 28–29, 2019
The Ritz-Carlton, Atlanta
Atlanta, GA

April 4–5, 2019
Royal Palms Resort and Spa
Phoenix, AZ

April 11–12, 2019
Fairmont Copley Plaza, Boston
Boston, MA

April 15–16, 2019
Advisory Board Offices
Washington, DC
The best practices are the ones that work for you.SM