**Predicting Threats to Service Line Growth**

*Five Shocks That Can Impact Your Market, and How to Prepare for Them*

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<th>Key to Market Shock Impact</th>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
<th>Very High</th>
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**Anticipated Threats**

**Innovative Payment Models**

**Risk exclusion from narrow networks:** Providers risk exclusion from narrow networks based on episodic cost profile for heart failure, PCI, and CABG.

**What To Do**

Target strategic partnerships with post-acute care providers to improve episodic cost performance.

**Rise of Virtual Care**

**Expanding tele-stroke networks will disrupt existing, informal referral relationships across larger geographic markets.**

**What To Do**

Assess regional tele-neurology opportunities and strengthen existing partnerships to maintain and expand program reach.

**New Clinical Affiliations**

**Regional clinical affiliations threaten local market share losses for high-margin, traditional cardiac services (e.g., CABG).**

**What To Do**

Evaluate which local providers are entertaining clinical partnerships; assess what portion of market share is at risk.

**New Ambulatory Competition**

**New urgent care competition capturing patients upstream of specialty referral.**

**What To Do**

Evaluate opportunity for increasing access through on-demand ambulatory offerings (e.g., orthopedic urgent care clinics, sports performance services).

**Increase of Consumerism**

**Providers who fail to manage cost and quality for joint replacements risk reduced reimbursement from Medicare penalties.**

**What To Do**

Target strategic partnerships with post-acute care providers to improve discharge planning and episodic cost management.

**Innovative Payment Models**

**Purchasers will steer to providers with price-competitive, demonstrably high-quality care for GI procedures (colonoscopy, bariatrics).**

**What To Do**

Evaluate cost and quality performance, and communicate value proposition to purchasers to effectively manage price competition.

**Increased Consumerism**

**Providers focused on meeting high-acuity needs will focus more on network inclusion for advanced sub-specialty care (e.g., late stage colorectal, and head and neck tumors).**

**What To Do**

Assess cost and quality competitiveness for episodes of care around key tumor sites, and consider need for advanced program designation.

**New Ambulatory Competition**

**New competitors offering on-demand access to wide range of services (primary care, wellness, behavioral health, and midlife services) for women will disrupt ability to retain patients over time.**

**What To Do**

Evaluate opportunities for enhancing patient service through on-demand care via tele-health or enhanced appointment hours.