
Published by Health Care Industry Committee

2019-2020 Health Care Advisory Board National Meeting Series

Key Takeaways for Suppliers and Service Providers

Research Agenda Executive Summary

The 2019-20 HCAB National Meeting series will help health care leaders navigate continued disruption and political uncertainty. The two-day meetings will open with a discussion of how providers can preserve their mission and restore strong margins by meeting the affordability mandate. Attendees will then learn how providers can approach the increasing need to capture ambulatory growth, compete in primary care, address social determinants of health, and hardwire innovation.

State of the Union – Revolution or Reformation?

The national meeting will open with a discussion about the radically changing health care market. We'll start by decoding the Medicare for All debate and help attendees differentiate between policy and politics leading up to the 2020 elections. This session will then cover a potential shake-up in the physician landscape that will test the durability of established hospital-physician relationships, and outline how technological innovations could enable true clinical economies of scale.

Wait Time Zero

This session will focus on how providers can achieve ambulatory growth by offering superior access. First, we'll discuss how modernizing network strategy can help overcome the internal barriers, leadership disconnects, and counterproductive incentives that inhibit growth. Second, because providers must win consumer preference to realize their growth ambitions, we showcase how organizations can create a clear and compelling value proposition in an increasingly crowded market.

The Future of Primary Care

Segmentation, technology, and competition are all reshaping the front door of the care delivery system. In this session, we will navigate the tension between specialization and scale in the new primary care landscape, and then assess how artificial intelligence, digital health, and other innovations could transform primary care. This session then ends with a close look at how providers can reconfiguring care team roles and responsibilities to expand capacity, improve outcomes, and reduce burnout.

The New Mandate for Social Determinants of Health

In this session, we define providers' role in advancing healthy equity by outlining the different ways hospitals and health systems can inflect non-clinical factors that influence health outcomes. We then distill keys to success – and pitfalls to avoid – from our conversations with leaders that are addressing social determinants of health today.

Unlocking Innovation at Scale

This presentation will focus on three strategic essentials providers must adopt to enable innovation at scale. Attendees will learn how providers can crystalize an innovation strategy, develop operational capabilities that foster innovation initiatives, and drive innovation across the entire enterprise.

The big picture impact for your provider customers



Clinical technology

- Providers interested in consumer-focused strategies to retain or gain market share will invest in technologies that facilitate virtual care and personalized medicine.
- Providers must hardwire social determinants of health into care decisions before precision medicine can actually be precise.



Information technology

- There is no shortage of AI on the market. However, providers must implement technology at an appropriate pace by focusing investments on those that integrate seamlessly into existing workflows.
- As the health care industry at-large leverages more data and care delivery models, providers will need to invest in more advanced information sharing capabilities.



Health care facilities

- Ambulatory expansion must be approached with consumer access and convenience at top-of-mind in order to realize ROI in a crowded, competitive market.



Human capital

- AI will allow clinicians to deliver more efficient care and work at top-of-license.
- Providers must reconfigure care team roles and responsibilities to expand capacity, improve outcomes, and reduce clinician burnout.

Three major implications for your organization

- 1 Facilitate information sharing:** Emerging physician partnership structures, ambulatory expansion strategies, and technological advancements can decentralize where, how, and by whom care is delivered. In this new world, care fragmentation will complicate how information is stored and shared. Suppliers and service firms have an opportunity to provide value by offering customers accurate and complete information at the point of decision.
- 2 Address non-clinical factors of health:** Providers are beginning to play a more significant role in addressing patients' social determinants of health. Suppliers and service firms must evolve in lock step with provider strategy and engage customers in conversations about their role in this multi-faceted challenge.
- 3 Integrate solutions into customers' workflows:** Providing a solution is only one step in driving change. To realize widespread adoption, suppliers and service firms must also consider all the activities, work streams, and habits that their solution impacts.

Interested in registering for an upcoming meeting?



Register [online](#) or contact your Dedicated Advisor.



655 New York Avenue NW, Washington DC 20001 | [advisory.com](#)

This document does not constitute professional legal advice. Advisory Board does not endorse any companies, organizations, or their products as identified or mentioned herein. Advisory Board strongly recommends consulting legal counsel before implementing any practices contained in this document or making any decisions regarding suppliers and providers.