

HLTH

VRTL 2020

OCTOBER 12 - 15, 2020

THE YEAR EVERYTHING CHANGED

HLTH 2020 | THE YEAR EVERYTHING CHANGED

PUBLICIS HEALTH EVENT RECAP



INSIGHTS AND LEARNINGS FROM ACROSS PUBLICIS GROUPE



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THE POWER OF COVID-19 TO UNITE THE HEALTHCARE ECOSYSTEM

The annual HLTH conference is known to bring together movers and shakers from across the healthcare ecosystem and this year was no different. Across five days, more than 4,000 attendees tuned into hear from 250+ speakers from every corner of the industry.

This year's theme was appropriately, "the year everything changed" with the event agenda focused on the history-altering events of 2020. Sessions were capped in length and covered a swath of topics ranging from virtual care to health inequities to the role of A.I. and more. What stood out is how the COVID-19 pandemic has acted as an accelerant and united the healthcare ecosystem around a handful of key goals.

While the event had more than a dozen tracks across 100+ sessions and specialty content programs, we've curated our recap around four key themes we see stakeholders across the healthcare ecosystem getting behind:



Health Equity & Outcomes

Creating better outcomes for all



The Importance of Mental Health

Addressing the realities of mental illness



Data & Digital Acceleration

Simplifying the patient experience



Driving Omni-Experience Care

Evolving retail health & business transformation

LESSONS FROM A WELL-ORCHESTRATED VIRTUAL EXPERIENCE

More than ever before we are in an environment where our attention spans are shortened and easily diverted because of multitasking. HLTH sought to address these challenges by keeping the keynotes short (most were under 20 minutes) with the remainder of the sessions either being in the form of announcements or debates. Sessions are available for six months after the event. Key logistical insights from the virtual conference and platform include:

- **Short & Sweet:** Attention spans are shorter in virtual environments, keep presentations short, succinct, and to the point
- **Always Pre-Record:** Pre-record content so there are no tech glitches mid-conference (this also allows for a seamless transition between presentations)
- **Keep It Fun:** Each day ended with engaging entertainment that allowed people to decompress from the day with live music, a magic show, etc.
- **Platform Matters:** The all-in-one platform and LinkedIn integration meant it was easy to stay engaged, network with attendees, and follow-up beyond the event
- **On-Demand Drives Attendance:** Most people aren't taking off work for a virtual event, so providing the option to view on-demand drives attendance over a longer period-of-time

A photograph of a healthcare professional and a patient. The healthcare professional, on the left, is an older Black woman with short grey hair, wearing a white lab coat, a pink patterned face mask, and glasses. A stethoscope is around her neck. The patient, on the right, is an older white man with grey hair, wearing a blue polo shirt and a blue face mask. He is holding a clipboard. The background is slightly blurred, showing what appears to be a hospital or clinic setting with wooden paneling and a decorative orange and red border. Overlaid on the image is the text "HEALTH EQUITY AND OUTCOMES" in large, white, bold, sans-serif capital letters, arranged in three lines.

HEALTH
EQUITY AND
OUTCOMES

**“I hope this year will
be a reset for the life
sciences community
moving forward.”**

- Bill Anderson, CEO, Roche Pharmaceuticals



MERCK'S STRATEGY FOR COVID-19 AND BEYOND

Featuring: **Julie Gerberding, M.D.**, Chief Patient Officer, Merck;
Michael T. Nally, Chief Marketing Officer, Merck

THE TALK

Top Merck executives reflect on serving patients through the COVID-19 crisis and the company's progress in following the science to respond on both the vaccine- and therapy-development fronts. From a patient perspective, they addressed how the company is working to ensure that its medicines and vaccines continue to reach patients through the pandemic, while maintaining clinical trials and initiatives to advance health equity and health security globally. Looking to the future, Merck shared their plans for post-approval planning, achieving vaccine adherence and how they will approach an unprecedented distribution challenge.

THE TAKEAWAYS

- At the end of the day success with any COVID-19 vaccine will come down to trust at the local level
- Innovation that comes from partnership and cooperation across the industry is key to the future of medicine and healthcare
- For Merck, the foremost priority starts with the science. "We recognize the need for urgency but want to ensure that we have the trust of the population."





BATTLING COVID-19 WITH DATA & SCIENCE

Featuring: **Dr. Amy Abernethy**, Principal Deputy Commissioner, FDA;
Francis deSouza, CEO, Illumina; **Ruud Dobber**, EVP, AstraZeneca

THE TALK

In just one month, the world's top genomics company enabled the rapid genetic sequencing of the COVID-19 virus and powered the researchers working around the clock to track transmission, conduct surveillance, develop vaccines which could protect communities around the globe against future threats. With this head start, we were able to get crucial data on COVID-19 in the hands of those who can jump start vaccine development. The team shared insights and the latest updates from one of the companies at the front of the race to a vaccine. The FDA shared how they are using real world evidence to a better grasp on the virus and this new universe of infectious disease.

THE TAKEAWAYS

- There needs to be an interoperability of different healthcare systems:
 - Example – most vaccines are 2 rounds – what if someone gets one vaccine at a doctor's office in their hometown, then travels and must get their second shot at a CVS in another location – how do you manage the two data sets and the different types of vaccines?
- We need to focus on connecting all the different health data sets – data is MOST important right now.
- In the U.K. everyone's healthcare data is in one place and we've seen tremendous value in that data structure





CREATING A PERSONALIZED HEALTHCARE EXPERIENCE FOR EVERY PATIENT

Featuring: **Bill Anderson**, CEO, Roche Pharmaceuticals;
Teresa Graham, Head of Global Product Strategy, Roche Pharmaceuticals

THE TALK

Patients are desperate for new and better medicines and care. The healthcare system is overburdened. We need to rethink how we approach healthcare delivery—how we can make the most impact on patients' lives and lower burden on the healthcare system. An integrated solutions approach combines advanced technologies with high-quality medicines to create a personalized experience for every patient who is suffering and supports a more sustainable healthcare paradigm. Roche shared how the silver lining of COVID-19 has been the healthcare industry's willingness to collaborate to work more effectively.

THE TAKEAWAYS

- Our understanding of biology is moving faster than our healthcare system
- To truly recognize the promise that integrated health systems and personalized patient care can bring to patients, every piece of the healthcare system needs to evolve
- Collaboration has been the silver lining of COVID-19. The pandemic has forced many different entities to realize the need to work together
- Integrated data platforms are essential to growth and better outcomes for all—we must leverage data to inform patient care and treatment across the board



ASTRAZENECA'S WORK TOWARDS A NEW FUTURE OF HEALTHCARE

Featuring **Jose Baselga**, EVP, Research & Development Oncology, AstraZeneca

THE TALK

Inefficiencies in current health care systems and the need for innovation is nothing new; however, the COVID-19 pandemic has had an immediate and widespread impact, highlighting the need for reform and transformation of the way health care is currently addressed. Dr. Baselga, a cancer physician, is at the forefront of AstraZeneca's COVID-19 response, sketching out a vision of how oncology healthcare research and delivery of care can (and needs to) change—to improve the experience for cancer patients and to better prepare for the next healthcare emergency. Since March, AZ has been able to complete 85% of their clinical trials and moving forward 70% of their clinical trials will have a digital component.

THE TAKEAWAYS

Clinical trials of the future must consider:

- Is this CT patient-centric enough?
- Can we deliver therapies at home?
- Do they absolutely have to go to the hospital?
- Can we use digital tools to get the needs/symptoms of the patient so we can intervene earlier and improve outcomes?
- Can we simplify clinical trials?
- Can we bring data science AI that can indicate to us what population would most benefit from CT?



FOCUS ON HEALTH EQUITY: PATIENT ENGAGEMENT REDEFINED

Featuring: **Karissa Price**, VP, Marketing, Health & Wellness, Food & Consumables, Walmart; **Francois de Brantes**, SVP, Episodes of Care, Signify Health; **Shreya Kangovi**, Executive Director, UPenn, Penn Center for Community Health

THE TALK

The pandemic has disproportionately ravaged poor and minority communities, shining a light on social determinants, inequities in care access and outcomes disparities. Karissa Price, VP, Marketing, Health & Wellness, Food & Consumables at Walmart shared what the retail giant is doing to combat inequities in underserved American communities. Joined by public health experts, they discussed how any solution must be predicated by earning the trust of the communities they strive to serve.

THE TAKEAWAYS

- COVID-19 has exacerbated the long-standing inequities in the U.S. healthcare system—disproportionately impacting BIPOC
- This pandemic is not the great equalizer; it is the great amplifier
- Challenges are interrelated and patients in these communities are strong individuals, so getting to know them and providing them help through conversation is the most effective for good health outcomes
- We need trust—create space for HCPs to have vulnerable conversation with patients to help them with adherence and compliance
- Partnering with end-users is the best way for the industry to combat an exclusive, privileged approach to healthcare solutions
- We need to address the systemic issues and the individual simultaneously





**D A T A A N D
D I G I T A L
A C C E L E R A T I O N**

“Digital therapeutics has been the back-up quarterback for years. Now the backup quarterback has been put in and asked to deliver.”

- Albert Chan, Chief of Digital Patient Experience, Sutter Health



MAKING HEALTHCARE MORE DELIGHTFUL

Featuring: **Phil Fasano**, Chief Executive Officer, Gigster;
Tom Lawry, National Director for AI, Health and Life Sciences, Microsoft

THE TALK

In a rapidly changing world, health consumer requirements and expectations have evolved well beyond current healthcare offerings. In order to compete and thrive, healthcare organizations must re-earn consumer trust while freeing providers to transform the care experience. Technology, people and mindsets have all evolved—our health consumer experience needs to become a smooth and easy experience. Key aspects of this transformation include: meeting patients where they are, letting them interact with PCPs and caregivers across channels (in person, online, etc.), expanding telehealth, and practicing proactive healthcare that anticipates their needs.

THE TAKEAWAYS

- COVID-19 forced most health systems through two years' worth of digital transformation in just two months
- Leverage data analytics, AI and all embedded technologies to integrate all data sets in order to drive efficiencies. This will free up up to 30% of clinicians' time by automating many of their day-to-day repetitive tasks so they can refocus their time and energy on the patient
- Seize the day! The opportunity to drive lasting systemic change is in front of us right now, with COVID as the accelerant



“The opportunity for better care in the home is now.”

BUILDING A NEW HEALTH EXPERIENCE WITH ALEXA SKILLS

Featuring: **Rachel Jiang**, Head of Alexa Health & Wellness, Amazon

THE TALK

Healthcare companies and brands have the opportunity build Alexa experiences to help patients, members, and consumers manage their health from home. Amazon shared how they are always learning how to make Alexa a trusted, helpful assistant to help people accomplish healthcare tasks in the home—and the need for partners to power those experiences. Amazon provided examples of how they have worked with hospitals and health systems, national health plans, home health providers, live sciences companies, and other healthcare organizations to create Alexa Skills to help consumers manage medications, book doctor’s appointments, follow their physician’s care plan, and manage their chronic conditions.

THE TAKEAWAYS

- The Alexa Health & Wellness team was founded with the mission of helping people manage their health in the comfort, convenience and safety of the home
- In light of the pandemic, consumers are spending more time in our home and health and wellness is often top-of-mind
- 63% of the total US population (18+) uses a personal voice assistant on a regular basis. Alexa is the only HIPAA-eligible voice assistant on the market
- Voice is an emerging modality that is optimized for high-functional use cases where ease of use and speed win over more in-depth tasks, which translates well into healthcare



DEMOCRATIZING WORLD-CLASS CARE THROUGH DIGITAL HEALTH ECOSYSTEMS

Featuring: **Andy Jassy**, CEO, AWS; **Dr. Laurie Glimcher**, President and CEO, Dana-Farber Cancer Institute; **Frans van Houten**, CEO, Philips

THE TALK

While the world continues to battle the pandemic, the fundamental challenges of healthcare have not gone away and made existing priorities more urgent than ever before. Today's technologies have the potential to make best practices and world-class clinical knowledge available at scale, empowering care providers to offer the highest standard of medical care at anytime, anywhere. Three technology and healthcare leaders shared how they are driving new digital and scalable models for connected care orchestration through an ecosystem approach that brings together world-class clinical expertise, health technology, cloud services and AI.

THE TAKEAWAYS

- The pandemic has accelerated corporate adoption of cloud computing by 2-3 years
- Research under COVID was impacted—dry labs could continue from home, but wet labs could not and some experienced shutdowns of 6-8 weeks, many organizations used the time to write grants and explore new research and connectivity tools
- Dana-Farber Cancer Institute saw telemedicine increased from ~5 per week to 3K per week and it was well-received—telemedicine allowed family members join the virtual visit
- This is a defining moment for social justice and healthcare and there's an opportunity to leverage technology to democratize care and patient outcomes



TELEHEALTH IS HEALTH

Featuring: **Albert Chan**, Chief of Digital Patient Experience, Sutter Health; **Anand Iyer**, Chief Strategy Officer, Welldoc; **Cathy Zaremba**, Director, Product Marketing, Welldoc; **Frank Nydam**, VP, Global Healthcare Alliances & Solutions, VMWare

THE TALK

During the COVID-19 pandemic, telehealth's various modalities and clinical applications have proven to be a lifeline to individuals and expanded access to care to vulnerable populations. Prior to COVID-19, there were many barriers to telehealth but post-COVID these have been wiped away, providing myriad opportunities for telehealth solutions including: real-time virtual care, remote monitoring, and digital therapeutics (DTx), powered by machine learning and artificial intelligence (AI), as well as asynchronous technologies that securely transmit data collected from wearables, sensors and other digital devices to help inform clinicians' decisions throughout diagnosis and treatment.

THE TAKEAWAYS

- The first iPhone kids are going to be in college in 3 years and in medical school in 7—they will expect technology to be advanced when they get there
- 89% of healthcare leaders said the pandemic has accelerated their digital transformation...what could have taken 10 years was done in weeks, months and days
- 51% of healthcare organizations are increasing patient experience investments—moving towards improving the “consumer” experience, such as drive-up testing or visits



ADVANCES IN VOICE TECH

Featuring: **Yaa Kumah-Crystal**, Pediatric Endocrinologist, Clinical Director HealthIT, Vanderbilt University Medical Center

THE TALK

We're living in an interesting time where our computers can now understand our words and can help us find the information we need just by thinking aloud.

The days of a doctor staring at a screen while you are trying to talk to her may be long gone some day in the future. The folks at Vanderbilt University built a voice assistant for the doctor to quickly and easily read your health information. Meet Veve.

THE TAKEAWAYS

- Opportunities for voice tech in health:
 - Capturing real time conversations and using AI to translate those into notes
 - Voice commands for HCPs to look up drug info
 - Voice commands for consumers to activate against their health or healthcare
- Alexa can now convey emotion in her response. That's an important consideration when evaluating how Alexa might deliver different types of health news



**T H E
I M P O R T A N C E
O F M E N T A L
H E A L T H**

“If there is one silver lining of this pandemic it’s that mental health is becoming a part of the conversation.”

- Karen S. Lynch, EVP, CVS Health & President, Aetna, CVS Health



ADDRESSING DIVERSITY IN MENTAL HEALTH CARE

Featuring: **Amit Paley**, CEO The Trevor Project; **Annelle Primm, M.D.**, Senior Medical Director, The Steve Fund; **Cynthia Germonotta**, President & Co-Founder, Born This Way Foundation; **Patrick Kennedy**, Former U.S. Representative, Rhode Island

THE TALK

The events of 2020 put a spotlight on glaring inequities in accessing mental health care. The organizations represented on this panel have been connecting diverse populations with the resources, tools and initiatives to close the gap since their inception. Because of COVID quarantine, many LGBTQ+ youth are stuck in homes with families that don't accept them with 40% reporting they are unable to express their true selves and 56% for trans and non-binary people. Across the board, 1 in 4 young adults contemplated suicide in June according to the CDC.

THE TAKEAWAYS

- Policy change is needed to end disparity/discrimination in mental healthcare and COVID policy changes—such as telehealth for mental health services—need to be made permanent
- We need more clinicians in the space with cultural competence—ones that look like and can relate to the minority patients who are seeking help
- Pronouns matter—the degree to which a person's pronouns are regarded and accepted has a direct correlation to their likelihood to commit suicide
- An LGBTQ person who has just ONE accepting adult in their life can reduce their risk of suicide by 40%





PRESENCE OF MIND

Featuring: **Don Mordecai**, National Leader for Mental Health and Wellness, Kaiser Permanente; **Jack Etienne**, CEO, Cloud9

THE TALK

Kaiser Permanente and Cloud9 have created an innovative partnership to help the gaming and E-sports communities understand the importance of mental health. Together, they created Presence of Mind, a behavior change initiative with a goal of moving people from uninformed/complacent about mental health to prioritizing their own mental health and becoming mental health allies.

THE TAKEAWAYS

- 1 in 6 U.S. youth ages 6-17 experience a mental health condition each year
- 50 % of all lifetime mental health conditions begin by the age 14, and 75% by the age of 24—treatment needs to be accessible at a younger age.
- The key to success is the power of personal stories to help break down stigmas around mental health



ON A MISSION FOR MINDFULNESS

Featuring: **Dr. Megan Jones Bell**, Chief Strategy and Science Officer, Headspace; **Dr. Murali Doraiswamy**, Professor of Psychiatry and Medicine, Duke University School of Medicine; **Unity Stoakes**, Co-Founder & President, StartUp Health

THE TALK

In the throes of one of the most challenging years in recent history, we are realizing very quickly that our society is stressed out, anxious, depressed, sleep-deprived—to name a few. People are crying out for solutions to their mental health woes and mindfulness may just be one route to relief. Does the boom of mindfulness apps and digital mental health tools prove that we are trending towards digital as the main path to care? Research shows mental health and substance use disorders are top 1-2 diseases driving disease burden for age 50 and below; top 1 and 2 for people aged 20-50 and each year 1 in 5 adults experience a mental health disorder. 1 billion people around the world have mental health issues; suicide occurs every 40 seconds; mental health issues is the leading cause of productivity loss in the workplace. While mindfulness apps are helpful—we must shift from reactive to proactive if we want to move the needle in mental health.

THE TAKEAWAYS

- The problem is not always access and there are treatments that are effective. The problem is that people access them too late or not at all. Technology can be a facilitator for access, but we also need to close the digital divide to make access easier.
- We need better integration of digital and physical behavioral health systems—better reach and better physical and mental outcomes will occur with a more connected ecosystem.
- It's not about machine vs. man. It's about integration of both—how can machine deliver care standardized by humans / extend human care; how can human therapists benefit from phenotyping and remote monitoring info that machines can provide.

A pregnant woman with her hair pulled back, wearing a bright yellow jacket over a white top, is smiling as she looks at a smartphone held in her hands. A pharmacist with dark curly hair, wearing a white lab coat, is leaning in and pointing at the phone's screen. They are standing at a pharmacy counter. In the background, another pharmacist is working at a computer, and shelves of various medications are visible. The overall atmosphere is professional and helpful.

D R I V I N G
OMNI-EXPERIENCE
C A R E

“ The pandemic has accelerated our transformation, and that is allowing us to meet the demands of our communities, our customers, our clients in very meaningful ways. We’ve seen dramatic shifts towards multichannel integrated health delivery.”

- Larry Merlo, President & CEO, CVS Health



COMMUNITY PHARMACY AS A NEIGHBORHOOD HEALTHCARE

Featuring: **Alex Gourlay**, Co-Chief Operating Officer, Walgreens-Boots Alliance

THE TALK

Walgreens is no longer just about brick-and-mortar pharmacy services. Alex Gourlay outlined WBA's omni-channel approach as a pathway to growth. Looking ahead, it is key for retail health to provide a variety of health services anytime and anywhere to consumers and increase both access and convenience. The current pandemic is accelerating this growth and changing the way we think about incorporating technology and transforming the business of healthcare. Before, during and after the pandemic, community pharmacies can be a main source of care to consumers all over.

THE TAKEAWAYS

- By bringing together local solutions with digital tools, Walgreens is striving to open-up the front door of primary care in America
- People are much more aware of their health and being educated on how to stay well (i.e. concerned about differentiating between flu and COVID)—these behaviors will stick into the future
- Walgreens has locations in some of the most underserved areas in America and is working hard to bring the new services, partnerships and new digital tools to do their part to ensure health equity





DRIVING INNOVATION IN THE NEW HEALTH CARE LANDSCAPE

Featuring **Karen S. Lynch**, EVP, CVS Health & President, Aetna, CVS Health; **Larry Merlo**, President & CEO, CVS Health

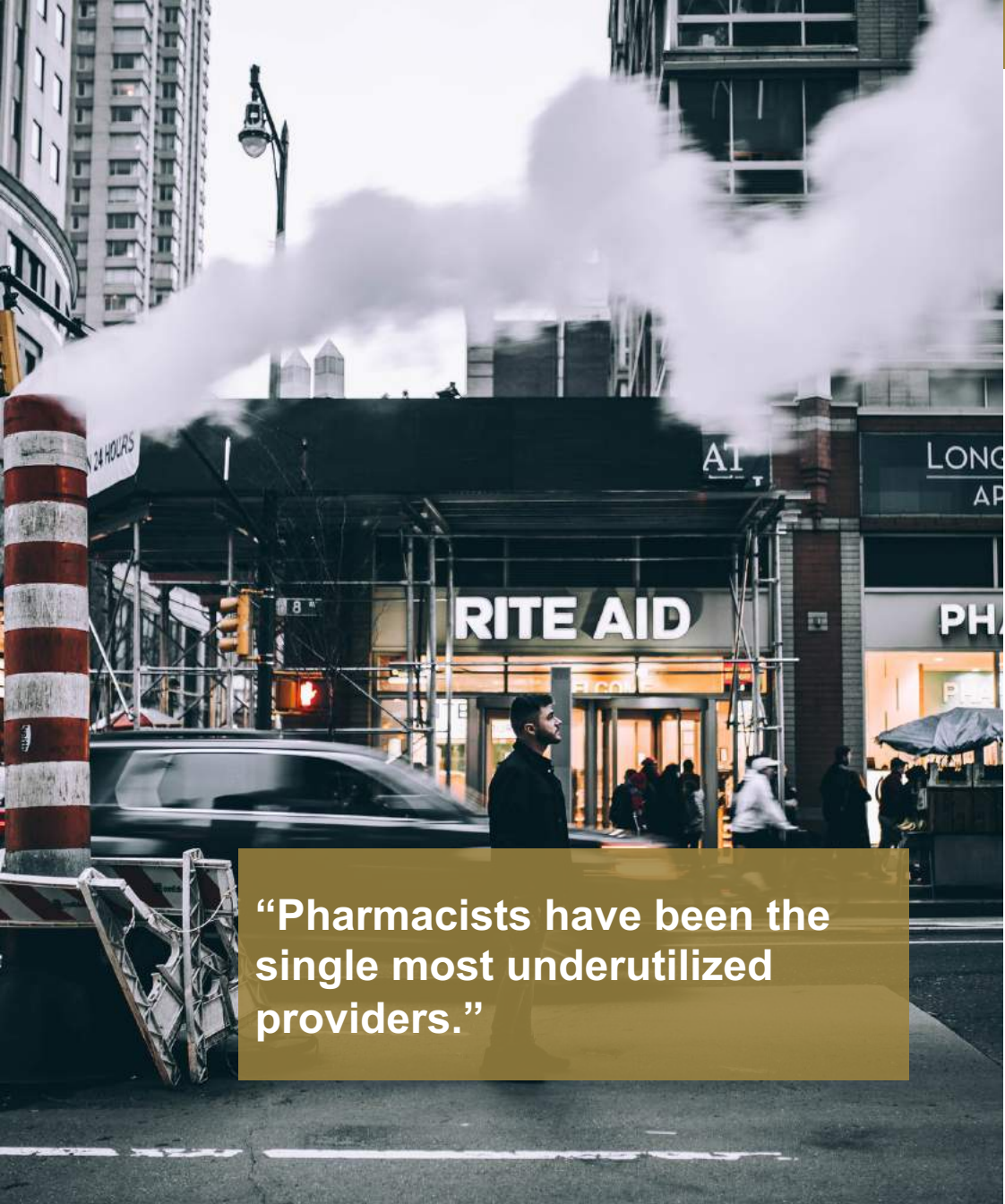
THE TALK

CVS Health/Aetna were 12 months into their merge/transformation when COVID hit. The pandemic became an opportunity to reprioritize the transformation to health services. Top executives at CVS Health dug into the acceleration of changes in consumer behavior, the need for continued innovation in health, as well as the opportunities to strengthen the U.S. health system that have been underscored by the pandemic. CVS swiftly adapted to respond to COVID-19, implementing: local delivery, e-clinics for telehealth, liberalized benefits, provisional access to mental healthcare, and will be adding social workers to their clinics in January.

THE TAKEAWAYS

COVID-19 trends in retail health will be permanent post-pandemic, including:

- Telemedicine – which gives more access to rural communities, and more opportunities for mental health services
- Delivery of home health services
- Vaccines and diagnostic testing in stores
- The future of retail health is omnichannel care



“Pharmacists have been the single most underutilized providers.”

A NEW DAY AT RITE AID

Featuring **Jim Peters**, Chief Operating Officer, Rite Aid

THE TALK

Rite Aid Corporation is on the front lines of delivering healthcare services and retail products to more than 1.6 million Americans daily. Aiming to solidify its standing as the go-to neighborhood pharmacy, Rite Aid provides an array of total health and wellness products and services for the entire family through over 2,400 retail pharmacy locations across 18 states. Rite Aid’s RxEvolution strategy is well underway, featuring a more powerful role for the pharmacist, a balance between traditional health and alternative wellness, and refreshed stores and branding in support of the new Rite Aid. Rite Aid is adopting an omnichannel, multi-pronged approach to usher in a new era in pharmacy with the pharmacist at the forefront.

THE TAKEAWAYS

- Over 90% of consumers state that they trust their pharmacists
- Pharmacists are underutilized and will play an essential role in the future of retail health—driving relationships with patients and providing holistic health guidance
- The next generation pharmacy features the patient first, with a Genius Bar-like experience and virtual care rooms connecting them with providers
- Rite Aid will also be launching an in-store curated set of products for millennial women 25-49 who are taking care of their kids and families and aging parents



A LAUNCHPAD FOR ACCELERATING INDUSTRY TRANSFORMATION

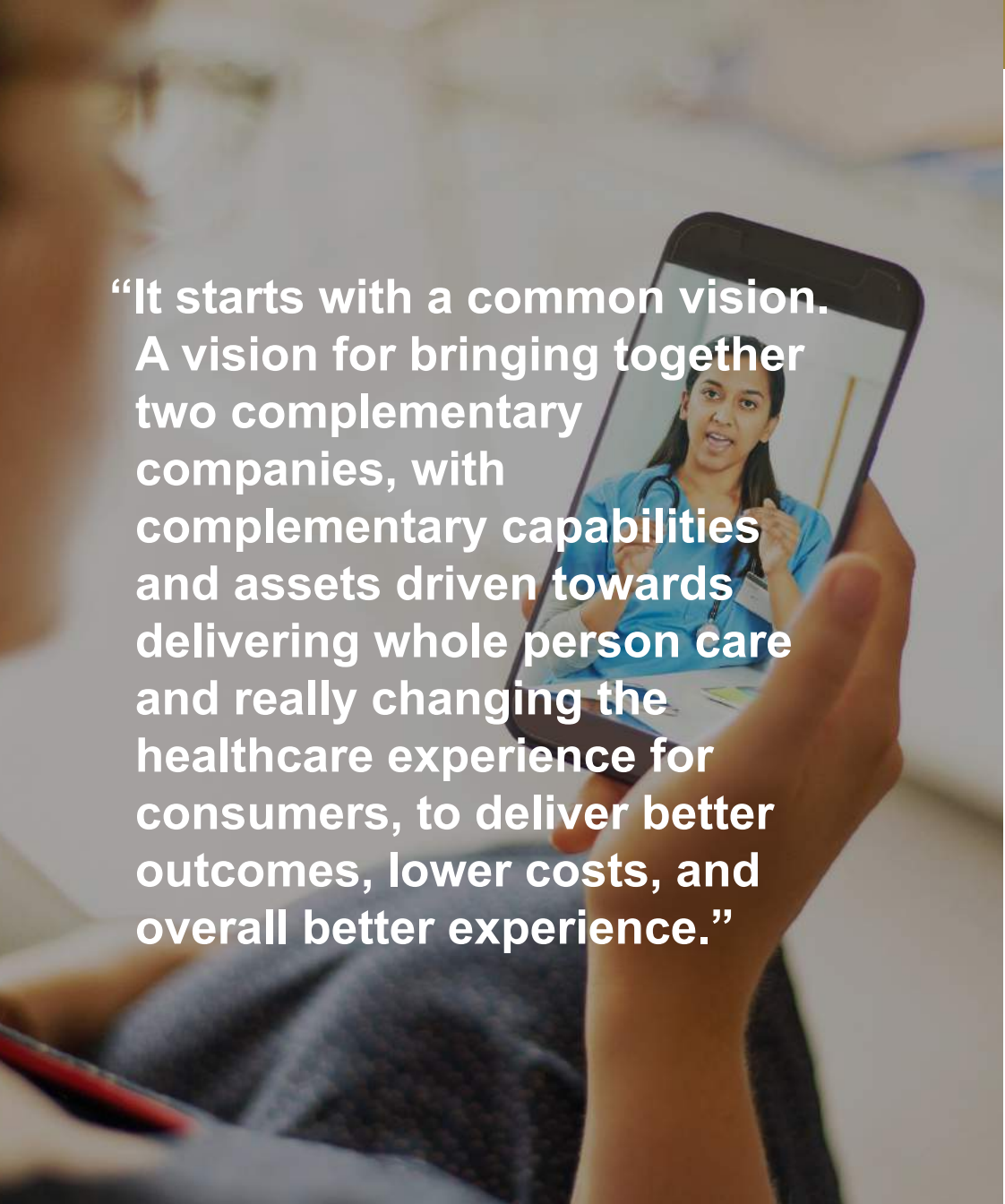
Featuring: **Bradley Fluegel**, Principal, BMF Advisors; **Bruce Broussard**, President and Chief Executive Officer, Humana, Inc.; **Dr. Helen Boucher**, Chief, Division of Geographic Medicine and Infectious Diseases, Chair, Physicians of Tufts Medical Center, Tufts Medical Center

THE TALK

The events of 2020 have been eye-opening to the health industry and put an increased emphasis on health equity in the midst of a global pandemic. This session focused on how Humana is using COVID-19 as a way to accelerate positive change for their members in addressing health disparities and continuing to evolve the health experience for the better.

THE TAKEAWAYS

- Humana waiving any fees for COVID care and payment models must evolve and adapt across channels with the continued introduction and adoption of technology and telemedicine
- Leaders need to be more thoughtful in leading in a virtual environment and must take on more responsibility to tackle health inequity
- Simplicity, a focus on outcomes, and a willingness to compete for customer satisfaction are the cornerstone of Humana's strategy



“It starts with a common vision. A vision for bringing together two complementary companies, with complementary capabilities and assets driven towards delivering whole person care and really changing the healthcare experience for consumers, to deliver better outcomes, lower costs, and overall better experience.”

UNLOCKING THE FULL POTENTIAL OF VIRTUAL CARE: TELEHEALTH & LIVONGO

Featuring: **Blake Dodge**, Healthcare Reporter, Business Insider; **Glen Tullman**, Founder and Executive Chairman, Livongo; **Jason Gorevic**, Chief Executive Officer, Teladoc Health

THE TALK

After announcing the largest merger in healthcare IT and digital health industry history, Teladoc Health CEO Jason Gorevic and Livongo Founder and Executive Chairman Glen Tullman went on the virtual stage together for the first time to discuss the future of virtual care for consumers, employers, payers, and providers. The two provided a status report on the merger and shared updates on the adoption of the combined offerings.

THE TAKEAWAYS

- The Teladoc + Livongo merger is focused on “delivering whole person care”—providing a consumer-centric virtual care experience in one place:
 - Patients have been asking for an all-in-one platform to access virtual care to both companies, and Teladoc/Livongo are providing it without losing empathy, human touch nor the HCP connection
- The combined platform allows patients talks to a Teladoc HCP, Livongo sends strips/healthcare tools to the home, eliminates copays, automates Rx delivery, and shares real time readings back to the HCP
- These platforms are especially beneficial to patients with chronic or multiple conditions—adding time and financial efficiencies to an often overburdened population



PUSHED TO AN INFLECTION POINT: WHY HEALTHCARE'S DIGITAL MOMENT IS NOW

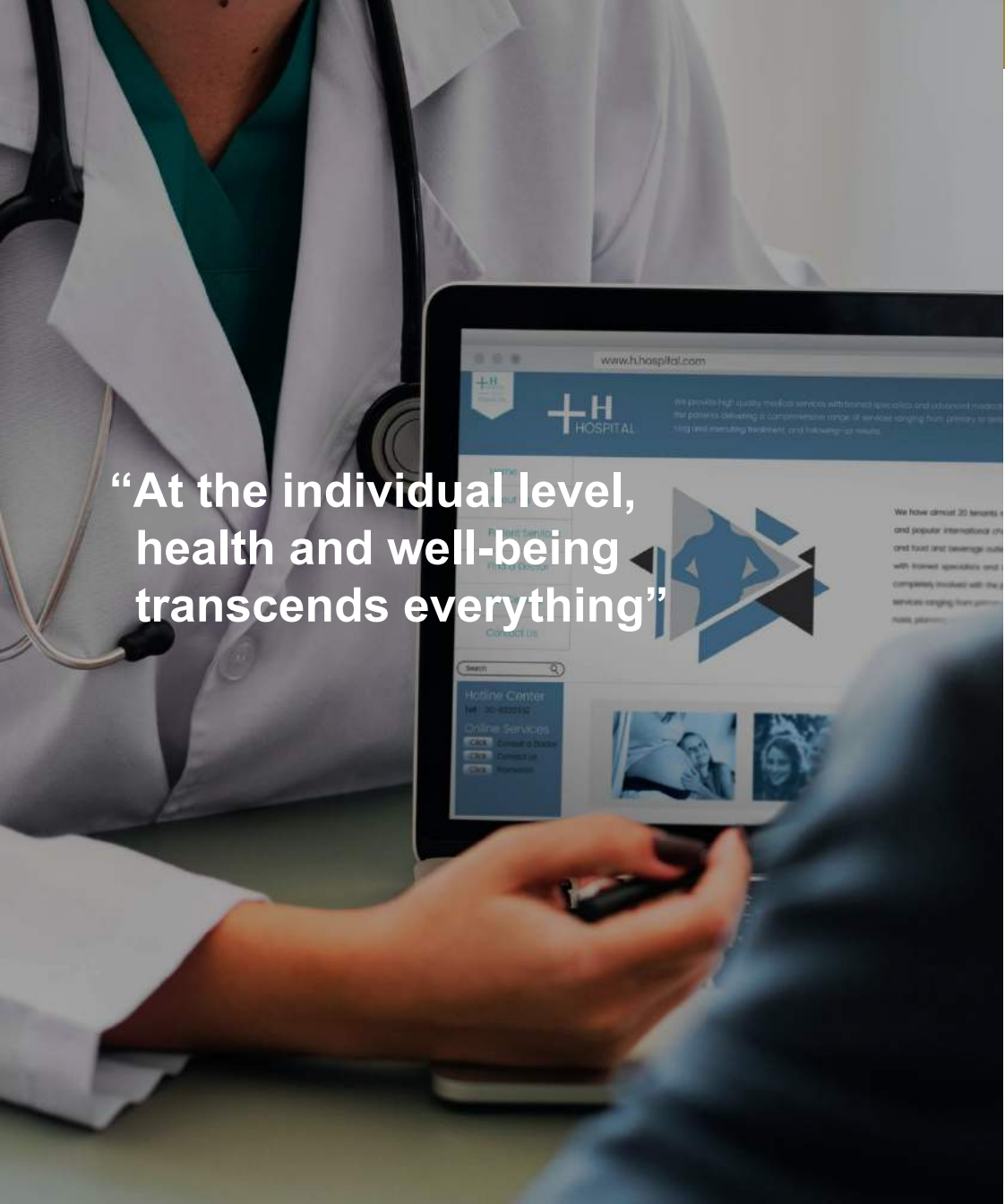
Featuring: **Bertrand Bodson**, Chief Digital Officer, Novartis

THE TALK

Two and a half years ago, Novartis set out on an ambitious digital transformation to become the leading medicines company powered by data science and digital technology. From daring to approach drug discovery as a computational challenge and bring drugs to market two years faster, to transforming the way they engage with patients and HCPs, Novartis is on a journey to go big on data and digital. Nobody asked for it, but the pandemic has accelerated the scaling and adoption of Novartis's transformation, changed perceptions of the industry and challenged us all find new and more personalized ways of engaging with customers—and there is no going back. Novartis outlined their digital roadmap and what lies ahead for the pharmaceutical giant.

THE TAKEAWAYS

- **3 Big “What ifs”** are the goals to reach over the next few years
 - What if we reduce our time to market by at least 2 years? – particularly in R&D, how do we get by 2+ years the time to get our drug to market?
 - What if we could reach twice as many patients twice as fast? – especially in a sector that takes up to 15% of GDP with inefficiencies?
 - What if we can simplify our operations?
- **4 key priorities for scaling data and digital**
 1. Scale our digital lighthouses
 2. Make Novartis digital
 3. Become the #1 partner in the tech ecosystem, bringing together the best of science and technology
 4. Make bolder moves to fundamentally transform healthcare-at-large



“At the individual level, health and well-being transcends everything”

BUILDING A SUSTAINABLE MODEL OF HEALTHCARE

Featuring: **Dan Mendelson**, Founder, Avalere Health;
David Cordani, President and CEO, Cigna

THE TALK

2020 has presented a range of challenges that are impacting health care and shaping the future of the industry—from the global coronavirus pandemic and the financial uncertainty it has created, to the fight against systemic racism. Cigna’s President and CEO addressed how the health care industry is pivoting and specifically, what Cigna is doing to address these complex and deep challenges.

THE TAKEAWAYS

- Whole person connectivity is the core of health
- COVID has catapulted the advancements in healthcare that usually would have taken years to do
- Personalization brings more precision to patient outcomes
- Adoption of virtual care and services are exploding—aided by technology, data, highly-personal connectivity



A woman with a shaved head is smiling and looking directly at the camera. She is wearing a dark blue top and small earrings. The background is a lush, green forest with rolling hills under a bright sky. The word "APPENDIX" is overlaid in large, white, sans-serif capital letters across the center of the image.

APPENDIX

PUBLICIS GROUPE ATTENDEES

- **Lyn Falconio**, Chief Marketing Officer, Publicis Health
- **Cedric de Saint Hilaire**, VP, Marketing & Growth Initiatives, Publicis Health
- **Susan Manber**, Chief Patient Officer, Publicis Health
- **Michael Leis**, Chief Content Strategy Officer, Publicis Health
- **Brendan Gallagher**, Chief Connected Health Officer, Publicis Health
- **Bob Kasunic**, Global Client Lead, Publicis Health || President, N2
- **Greg Lewis**, Global Client Lead, Publicis Health
- **Nikki Muntz**, EVP, Business Development, Publicis Health
- **Brooke Stakias**, VP, Group Director, Business Development, Publicis Health
- **JohnMark Conklin**, Global Communications Manager, Publicis Health
- **Gabriella Basile**, Senior Manager, Global Growth Operations, Publicis Health
- **Marion Chaplick**, Global Client Lead, Publicis Health
- **Colan McGeehan**, Chief Investment Officer, Publicis Health Media
- **Lannise Galbraith**, VP, Programming & Events, Publicis Health Media
- **Michael Goodman**, VP, Investments, Publicis Health Media
- **Rachel Barron**, Account Supervisor, Razorfish Health
- **Ivy Chang**, Associate Director, Business Content, Publicis Health
- **Shannon Kunz**, VP, Enterprise Engagement Lead, Epsilon
- **Josh Barocas**, VP, Health Partnerships & Growth, Publicis Health Media
- **John Christopher**, VP, Commercial Investments, Publicis Health Media
- **Lee Fraser**, Chief Medical Officer, Digitas Health
- **Pete Groves**, SVP, Management Consulting, Publicis Sapient

K E Y
QUOTES

ASTRAZENECA

“At AstraZeneca, 70% of clinical trials going forward will have a digital component. Many trials will have digital approved devices that will monitor in real-time how the patient is doing.”



Dr. Jose Baselga
EVP, R&D, Oncology
AstraZeneca

“What if COVID-19 has helped us in the way we deliver care? What if COVID-19 has woken us up and told us that what we were doing was unnecessary, was burdensome, was expensive and was not giving any added value?”



Dr. Jose Baselga
EVP, R&D, Oncology
AstraZeneca

CVS HEALTH

“We are seeing a dramatic shift to define what omni channel means for health—meeting people in their community, in their home, or the palm of their hand.”



Larry Merlo
President/CEO
CVS Health

“When you think about healthcare, it is a contact sport—there are many things you can start digitally, but eventually in healthcare you have to touch someone.”



Larry Merlo
President/CEO
CVS Health

MERCK

“Our foremost priority starts with the science. We recognize the need for urgency but want to ensure that we have the trust of the population.”



Michael T Nally
Chief Marketing Officer
Merck

NOVARTIS

“Novartis has 3 big “what ifs” – goals we are trying to reach over the next few years:

What if we reduce our time to market by at least 2 years?

Particularly in R&D, how do we get by 2+ years the time to get our drug to market?

What if we could reach twice as many patients twice as fast?

Especially in a sector that takes up to 15% of GDP with inefficiencies?

What if we can simplify our operations?”



Bertrand Bodson
Chief Digital Officer
Novartis

“We need the best of each discipline to come together... We need science, technology, data to come together. We need more talent that thinks outside of the box.”



Bertrand Bodson
Chief Digital Officer
Novartis

RITE AID

“The pharmacist can be the whole-being health advocate for every customer.”



Jim Peters
Chief Operating Officer
Rite Aid

“Traditional healthcare system has been designed around occasional episodic events (doc visit) vs. the everyday choices that people make.”



Jim Peters
Chief Operating Officer
Rite Aid

ROCHE PHARMACEUTICALS

“Our understanding of biology is moving faster than healthcare systems—we have to learn how to marry the speed of biology with the ability to bring technology to patients faster and all over the world in sustainable ways.”



Bill Anderson
Chief Executive Officer
Roche Pharmaceuticals

“There’s no point
in breakthrough
medicine if it’s not
universally available.”



Bill Anderson
Chief Executive Officer
Roche Pharmaceuticals

WALGREENS-BOOTS ALLIANCE

“We are putting together really local solutions both physically and digitally to open up the front door of primary care in America.”



Alex Gourley
Co-Chief Operating Officer
Walgreens-Boots Alliance

“What we all have to do in this modern world is maintain relevance for customers, and our relevance starts with enormous emotion that is for people in health care and in personal care. There’s nothing more important in people’s lives than their health, and the more that we can demonstrate that we are able to bring the best solutions, the more we’ll be relevant and the more we’ll be able to meet the modern needs of modern patients, communities and customers.”



Alex Gourley
Co-Chief Operating Officer
Walgreens-Boots Alliance

Thank you