The Executive MindXchange Chronicles offer your very own detailed summary of the event presentations, general sessions and interactive sessions. You will benefit from a thorough and focused chronicle of the Frost & Sullivan Executive MindXchange, including key take-aways and action items to implement in your own organization. These collections ensure you don’t miss out on any of the event sessions and can still capture the golden nuggets from events you were unable to participate in.

A Sample From:
The Executive MindXchange Chronicles

Getting Ahead of the Curve in Transformational Health

21st Annual Medical Technologies: A FROST & SULLIVAN EXECUTIVE MINDXCHANGE

Where Global Medical Devices, Life Sciences, and Connected Health Leaders Meet

Hilton San Diego Resort & Spa
San Diego, CA

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Dear Colleague,

At the 21st Annual Medical Technologies: A Frost & Sullivan Executive MindXchange, we brought together top executives in the medical field to discuss the new healthcare industry paradigm: Disruption, innovation and transformation. We challenged these leaders to think about what they need to do now to stay ahead of change…or risk organizational obsolescence.

In the following pages, we present the Frost & Sullivan Executive MindXchange Chronicles, a collection of all the essential insights and emerging best practices discussed at the event. These session summaries and take-aways were compiled to help you make sure you are truly “Getting Ahead of the Curve in Transformational Health,” this year’s event theme.

Session notes include keynote speaker Peter Antall, M.D., Chief Medical Officer, American Well, discussing The Future of Consumer Health: Changing the Landscape of Healthcare and Randy Hamlin, Vice President & Segment Leader, Philips Healthcare, Philips Ultrasound, sharing his organization’s Success Story: Innovation in Platforms and Services.

Other highlights include Frost & Sullivan Senior Vice President, Greg Caressi, discussing New Business Models in Healthcare; Alex Hurd Senior Director, Product Development, Growth and Payer Innovation -- Health & Wellness Walmart, explaining Retail Healthcare: The Consumerization of Diagnostic Healthcare; and an Executive Bulletin, Medicine at the Dawn of the Genomic Era, led by Daniel S. Grosu, M.D., MBA Senior Vice President & Chief Medical Officer Sequenom, Inc.

The Executive MindXchange Chronicles bring access to cutting-edge insights and strategies designed to help you stay ahead of the curve in transformational health. We’re sure you’ll want to leverage all the valuable take-aways gathered from 21st Annual Medical Technologies: A Frost & Sullivan Executive MindXchange and implement them at your own organization soon.

Thank you for your participation in Frost & Sullivan’s events. I look forward to our continued partnership and welcome your feedback about the Executive MindXchange Chronicles.

Sincerely,

Brian Fitzpatrick
Partner
Frost & Sullivan
### TABLE OF CONTENTS

**Monday, March 14, 2016**

**KEYNOTE—with video link**  
The Future of Consumer Health: Changing the Landscape of Healthcare ..........4

**TRANSFORMATIONAL SHIFT**  
New Business Models in Healthcare.................................................................8

**EXECUTIVE INSIGHTS**  
Retail Healthcare: The Consumerization of Diagnostic Healthcare.....................11

**INTERACTIVE FORUM**  
New Products and New Opportunities in Precision Health: Population Health Management and Personalized Care .................................................................14

**CONCURRENT COLLABORATION ZONES**  
Zone 1: The Realities of Data Privacy, Protection and Cybersecurity: Today and Tomorrow ......................................................................................................................19

**CONCURRENT COLLABORATION ZONES**  
Zone 2: Connecting with Consumers: Creating Health Solutions that Stick ........23

**CONCURRENT COLLABORATION ZONES**  
Zone 3: Future Market Opportunities in Predictive Modelling and Medicine.........28

**NEW INNOVATION PARADIGMS**  
The Budding Relationships Between Payers, Providers, Medical Technology, and Pharmaceutical Companies .................................................................31

**CONCURRENT COLLABORATION ZONES – THINK TANKS**  
Zone 1: Using Little Data to Better Understand Your Big Data .........................35

**CONCURRENT COLLABORATION ZONES – THINK TANKS**  
Zone 2: Technology Enablement: A New Paradigm for Patient Therapy Empowerment ........................................................................................................38

**CONCURRENT COLLABORATION ZONES – THINK TANKS**  
Zone 3: Timing the Transition into Formal Medical Device Development: Don’t Throw Away Your Money! .................................................................................41

**Tuesday, March 15, 2016**

**KEYNOTE—with video link**  
Success Story: Innovation in Platforms and Services........................................47

**VISIONARY INNOVATION THINKTANK**  
Designing Disruptive Solutions and New Business Models for Healthcare ..........51

**CONCURRENT COLLABORATION ZONES – ROUNDTABLES**  
Zone 1: The Internet of Health Things .................................................................55
CONCURRENT COLLABORATION ZONES – ROUNDTABLES
Zone 2: Social Media - Based Consumer Engagement Strategies .................. 59

CONCURRENT COLLABORATION ZONES – ROUNDTABLES
Zone 3: Leveraging Hidden Opportunities in Supply Chain ....................... 61

EXECUTIVE BULLETIN
Medicine at the Dawn of the Genomic Era .................................................. 64

ASK THE EXPERTS! PANEL DISCUSSION
Wearables: We Can Measure, But Can We Monetize? ............................... 67

FRESH PERSPECTIVES—with video link
Using Your Best Resource for Successful Patient Outcomes – The Patient! .... 71

INVESTOR’S SPOTLIGHT
Perspectives from The Street and Sand Hill ................................................. 74

FAST FORWARD
The Future of Healthcare Reform: Post-Election Prognosis ......................... 77
ASK THE EXPERTS! PANEL DISCUSSION
Wearables: We Can Measure, But Can We Monetize?

MODERATOR
Elisabeth George, Vice President - Global Government Affairs, Standards & Regulations, Philips Healthcare
LinkedIn Profile

PANELISTS
Maulik D. Majmudar, M.D., Associate Director, Healthcare Transformation Lab, Massachusetts General Hospital
LinkedIn Profile

Robert Kaul, President and Chief Executive Officer, Cloud DX
LinkedIn Profile

Brian Markwalter, Senior Vice President Research & Standards, Consumer Technology Association
LinkedIn Profile

Bakul Patel, Associate Center Director for Digital Health, FDA
LinkedIn Profile

Jay Rajda, M.D., MBA, FACP Medical Director, Aetna Innovation Labs
LinkedIn Profile

Matthew Diamond, M.D., Ph.D., Medical Director, The Fossil Group, Inc.
LinkedIn Profile

TIME
Tuesday, March 15, 2016 at 2:00pm

SESSION ABSTRACT
Wearables are an integral part of consumers’ well-being. Consumers are captivated by the idea of wearables but do they hold longevity and how can the healthcare community benefit from this fascination for true success? The panelists above discussed opportunities around wearables and sought to understand the challenges of marketing, and monetizing them as well as assessing their market saturation and overall value.
KEY TAKE-AWAYS
- A framework to identify what a wearable is and why it’s needed in today’s continuum of healthcare
- Insights on benefits and risks – consumers, economic and clinical outcomes
- Critical factors to sustainability of wearables and identify potential ways to solve

OVERVIEW
A diverse group of industry professionals discussed how wearable health products support patients’ needs today and how they will do so in the future. Although wearables are in a period of experimentation, next steps include bringing data to an A.I. application on smart phones, getting wearables devices into the right hands, getting people to engage with the devices, and then getting important data…not for your company, but for your customer.

Key insights about the multibillion dollar wearables market include the importance of integrating these devices into the consumer’s lifestyle and updating them to be waterproof and stay charged.

Wearables and other consumer technologies have disrupted the payment and reimbursement model. Also, in the developing world, there is enormous market potential for wearables, but price and infrastructure are barriers. Infectious disease and infant mortality are much higher concerns in the developing world. Yet, the current thinking concerning this technology seems more focused on the developed world. This stratification, as well as other issues were discussed during the following question and answer session:

**Question: How do you see wearables impacting patients’ lives now and for the future?**

**Mathew Diamond** – We need to make patient support effortless in terms of design and patient experience, we need devices that don’t require charging, and are waterproof, which will help with adherence and compliance issues. Wearables companies have partnered with companies like Speedo and Victoria’s Secret to remove the burden from individuals by utilizing the clothing and apparel they already wear and the lifestyles they currently lead. Miniaturization puts us on the brink of something revolutionary in terms of the use and practicality of wearables. The regulatory environment also encourages innovation in this area.
Maulik D. Majmudar, M.D. – Currently, the most widely used wearable technologies are limited to wellness applications, such as activity and sleep tracking. However, wearables can impact patient’s lives in a much more significant manner by providing real-time monitoring and/or feedback with actionable insights. Maulik's organization attempts to address the problem by focusing on validation and implementation of technology-enabled solutions to establish the evidence necessary to drive sustainable clinical adoption. According to Maulik, the most important thing is to foster collaborative alliances among stakeholders such as provider organizations, payers, pharmaceutical companies and start-ups to accelerate the translation of novel technologies into real world clinical practice.

Robert Kaul – His company is on the forefront of “Star Trek” tricorder technology. Their product monitors vital functions such as resting heart rate and blood pressure on a continuous basis. Part of the challenge of this technology is patient usability/consumer friendliness. An issue: Large corporations are reluctant to invest in new technology without assurance of reimbursement.

Brian Markwalter – We are in a period of heavy experimentation on the part of companies as diverse as L’Oréal, a cosmetics company, and medical technology companies.

Jay Rajda – In terms of value creation, one problem is how to separate out chronic-condition applications from lifestyle applications such as weight loss in the area of wearables. There’s no clear answer as yet as to how to monetize the data derived from wearables as opposed to care management programs.

Bakul Patel – The FDA is concerned with the entire healthcare ecosystem, but it is less concerned with regulating wearables as activity-tracking devices than is the private sector. The FDA is more concerned with data security issues around connectivity and intended use.

TAKE-AWAY
- 50% of medical costs come from 5% of patients (usually serious chronic conditions)
- If there's evidence of value creation, funding will come
- Given high deductible health plans, subscription services may be viable
- If it's going to be valuable for the consumer, then they'll contribute to the cost
- There’s a sharp difference between wellness application and preventative application
• Those with chronic conditions deserve to have the same level of consumer experience
• Try to gather enough evidence of efficacy to gather the payers
• When there’s evidence of value creation, things will absolutely change
• Implications right now are too US-centric, which is only a small part of the world population, there’s a lot more market potential

FROM A GLOBAL PERSPECTIVE
• Wearables will have a much bigger and faster impact globally once the breakthrough comes; the need is greater there
• Awareness and cost are the issue right now along with infrastructure
• Other diseases are also the focus globally at the moment
• Wherever you have a cell phone you can have one of these devices, but you need a value based version of them
• Right now where technology is, it’s all about activity tracking, but there’s so much more available

FROM A COLLABORATION PERSPECTIVE
• The biggest thing to focus on is formal collaboration alliances: Providers, payers, pharma, and start-ups all have to team up to tackle this issue
• Distribute and target the right segments and right population to develop programs with all of this data to create value
• Improve targeting and distribution of these devices
• There are responsible ways to use these tools that we have to come up with as an industry
• Reduce time from conception to getting to consumer

FINAL THOUGHT
While the wearable market has been in a boom recently, we need to worry that the bubble won’t pop by finding new innovative ways to use and interpret wearables. Aim for expanding the market globally; just because it’s harder for non-US populations to adopt doesn’t mean that the biggest market share should be ignored, find a way to reach this global market and increase your customer base.
You will benefit from a thorough and focused chronicle of the Frost & Sullivan Executive MindXchange, including key take-aways and action items to implement in your own organization. These collections, prepared mostly by your peers, ensure you don’t miss out on any of the sessions that run concurrently with those that you choose to attend. Simply stated, we pull out the golden nuggets of the event for you.

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Calendar of Events

12th Annual Manufacturing Leadership Summit
Featuring the Manufacturing Leadership Awards Gala
June 6 - 9, 2016 | Carlsbad, CA
Omni La Costa Resort & Spa
EXECUTIVE AUDIENCE: The Manufacturing Community

10th Anniversary Customer Contact, Europe: A Frost & Sullivan Executive MindXchange
13 - 15 June 2016 | Athens, Greece
Royal Olympic Athens Hotel
EXECUTIVE AUDIENCE: The Call Center / Contact Center Community

17th Annual Digital Marketing: A Frost & Sullivan Executive MindXchange
July 11 - 13, 2016 | Asheville, NC
Omni Grove Park Inn
EXECUTIVE AUDIENCE: The Marketing and Communications Community

Growth, Innovation and Leadership 2016: Silicon Valley
September 11 - 13, 2016 | Santa Clara, CA
Hyatt Regency Santa Clara
EXECUTIVE AUDIENCE: CEO’s and their Growth Team

12th Annual Customer Contact, West: A Frost & Sullivan Executive MindXchange
October 23 - 26, 2016 | Tucson, AZ
 JW Marriott Tucson Starr Pass Resort & Spa
EXECUTIVE AUDIENCE: CEO’s and their Growth Team

13th Annual Customer Contact, East: A Frost & Sullivan Executive MindXchange
April 23 - 26, 2017 | Marco Island, FL
Marco Island Beach Resort, Golf Club & Spa
EXECUTIVE AUDIENCE: The Call Center / Contact Center Community

22nd Annual Medical Technologies: A Frost & Sullivan Executive MindXchange
March 12 - 14, 2017* | San Diego, CA*
EXECUTIVE AUDIENCE: Medical Device Manufacturing and Technology Community

January 9 - 11, 2017* | San Diego, CA*
EXECUTIVE AUDIENCE: The Innovation and Product Lifecycle Community

4th Annual CIO Impact!: A Frost & Sullivan Executive MindXchange
February 5 - 7, 2017* | Austin, TX*
EXECUTIVE AUDIENCE: The IT Community

21st Annual SCIP European Summit
7 - 9 November 2016 | Prague, Czech Republic
Prague Marriott Hotel
EXECUTIVE AUDIENCE: The Intelligence Community

32nd Annual SCIP International Conference & Exhibition
May 15 - 18, 2017 | Atlanta, Georgia
Atlanta Marriott Marquis
EXECUTIVE AUDIENCE: The Intelligence Community

LOCATIONS AND DATES WORLDWIDE

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DISCLAIMER

These Chronicles discuss key insights and take-aways from 21st Annual Medical Technologies: A Frost & Sullivan Executive MindXchange, held March 13 - 15, 2016, Hilton San Diego Resort & Spa San Diego, C A. Frost & Sullivan makes every effort to ensure the quality of individual session Chronicles; however, the summaries presented in the articles are the expert opinion of the writers, and inclusion/exclusion of specific material is at the discretion of each speaker. For more details, visit www.frost.com/chronicles. Frost & Sullivan is not responsible for the loss of original context or the accuracy of the information presented by the participating companies.