



Three Questions

- How will the healthcare business change in the next 5 years?
- How will consumerism affect healthcare?
- How can we leverage virtual health towards our growth strategy?

What do They Think About Healthcare?



Health System = Maze



Image Source: Adam Bluestein, Inc. Magazine



The Virtual vs. Physical Experience

Consumers

- 50 - 60% of their time in virtual experience
- Researching health & providers
- Tracking health & fitness
- Accessing virtual health
- Reviewing & rating providers
- Transacting via health portals

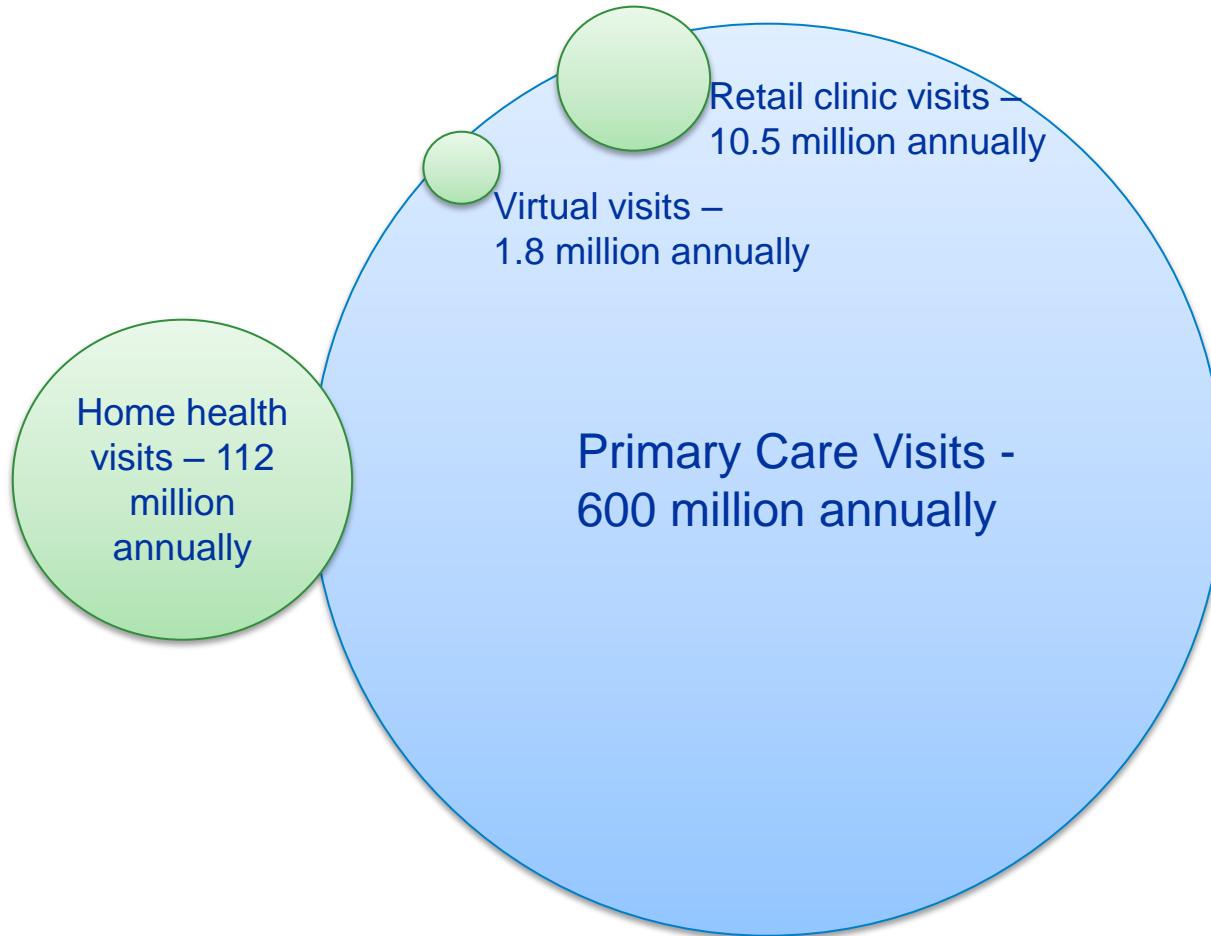


Healthcare Leaders

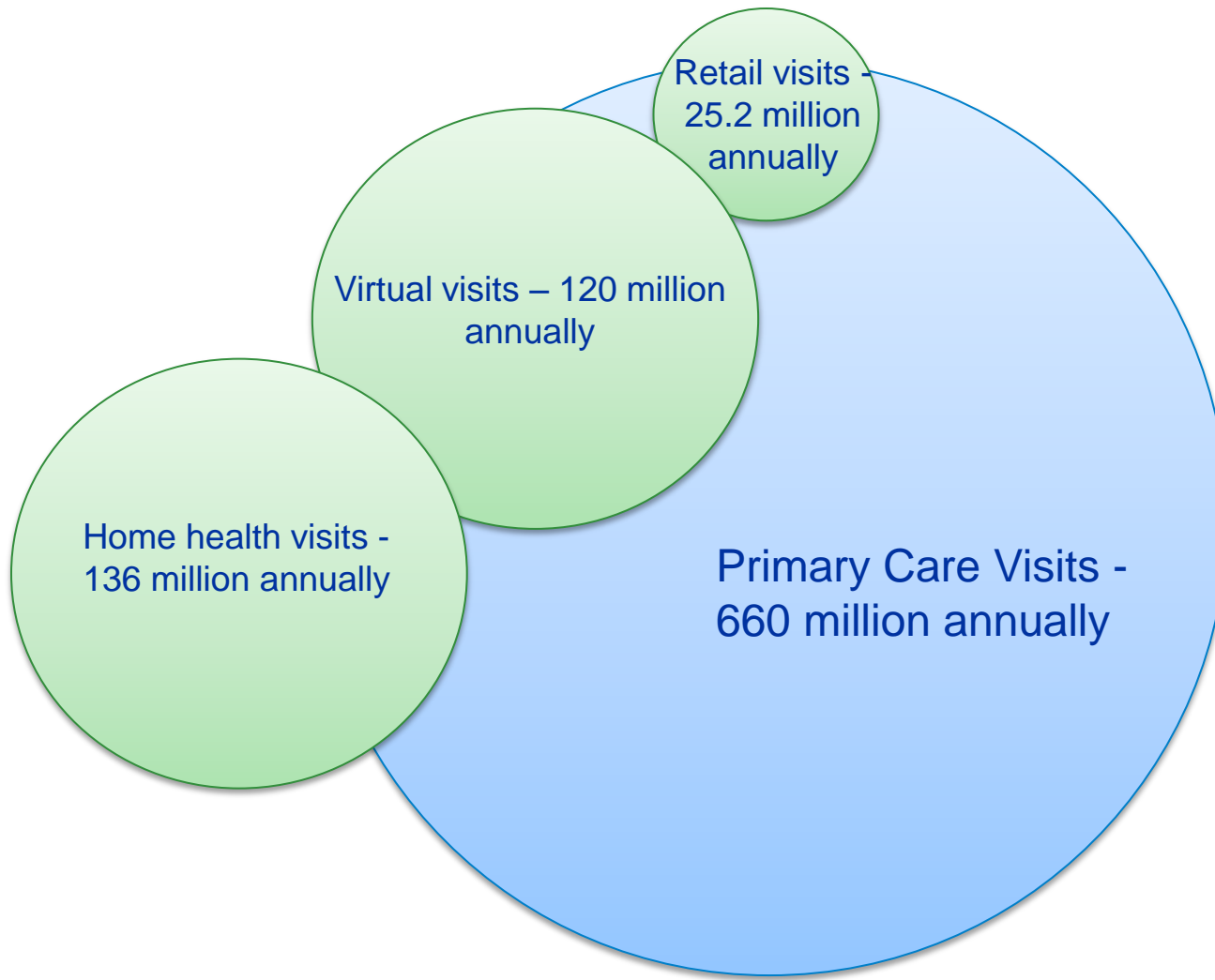
- 90% of their time managing the physical experience



600 Million Traditional PCP Visits in 2015



20% Reduction in PCP Office Visits by 2020?



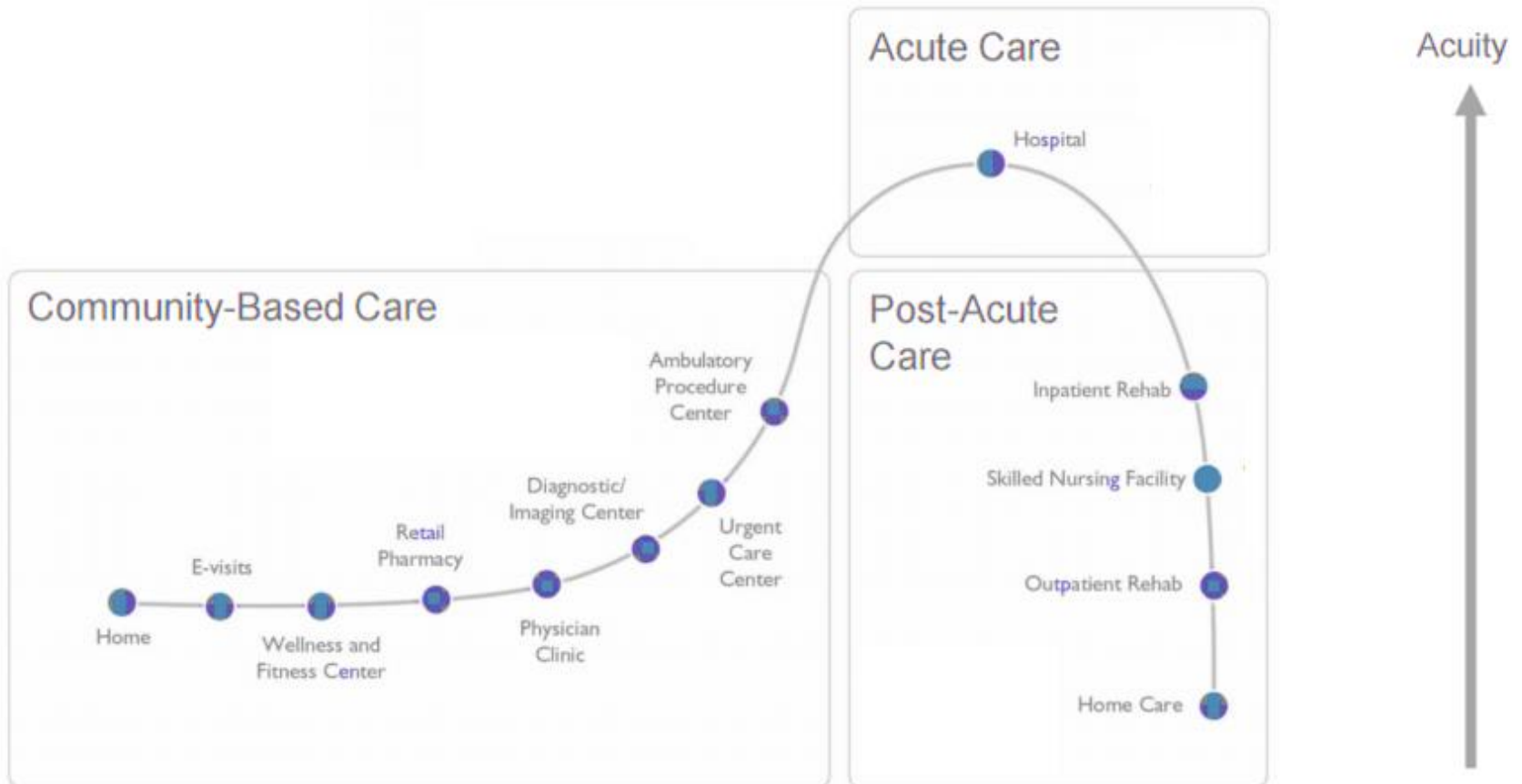


2015 Blue Chip: Virtual Health

- **Patients & Communities**
 - Provide person-centered care that focuses on convenient access, affordable prices, matched with a great experience at the quality of an in-person visit.
- **Our Organization**
 - Enhance system growth
 - Cost-savings with improved quality
 - Foundational to create full virtual health offering

Segment & Beachhead Position on Continuum

- Consumer-Based Care (retail) for Associates and Public
- 24/7 Primary Care at your fingertips





Virtual Health: eVisits

- Multi-disciplinary Team Convened to Coordinate Efforts
- Selected National Vendor as Partner for:
 - Associate Benefit
 - Retail Offering
- 24/7 Primary/Urgent Care at Your Fingertips



The Vision and Journey Ahead

