CHILMARK
R E S E A R C H

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RESEARCH AGENDA

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2018/19 RESEARCH THEMES AND AGENDA*

2018

Population Health Management Market Trends Report (MTR)

Patient Relationship Management Market Scan Report (MSR)

Blockchain in Healthcare Market Scan Report (MSR)

Point-of-Care Experience Solutions Insight Report (IR)

Natural Language Processing Market Scan Report (MSR)

Healthcare App Stores: Status and Outlook Market Scan (MSR)

Telehealth 2018: Vendor Assessment and Market Outlook (MSR)

Bundled Payments: Current Tools and Strategies Market Trends (MSR)

2019

Imaging Analytics Market Trends

Precision Medicine Market Scan

2019 Healthcare Analytics Market Trends

Convergence in Healthcare 2019 Monitor

Payment Integrity (RCM 2.0) Market Trends

Creating and Enabling High-Performance Networks Monitor

Evolving Front Door to Care Monitor

HIE/Interoperability Market Trends
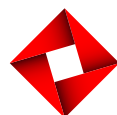
Defining and Creating Value from PHM Programs

Care Management Market Trends

Engagement Market Trends

IT-Enabled Services for PHM Market Trends

*Calendar is subject to change in response to what we see developing in the industry throughout the year and client input regarding research needs.

2019 PUBLICATIONS BY DOMAIN

Analytics	Care Management	Engagement	Interoperability	Population Health Management (PHM)	Provider-Payer Convergence (PPC)
▌ Imaging Analytics Market Trends (Q1) ▌ 2019 Healthcare Analytics Market Trends – Clinical (Q1) ▌ 2019 Healthcare Analytics Market Trends - Payer (Q1)	▌ Bundled Payments: Current Tools and Strategies Market Trends (Q4'18 CAS/ Q1'19 public) ▌ Creating and Enabling High Performance Networks Monitor (Q2/ Q3) ▌ Care Management Market Trends (Q4)	▌ Evolving Front Door to Care Monitor (Q2) ▌ Engagement Market Trends (Q4)	▌ HIE/Interoperability Market Trends (Q3)	▌ Precision Medicine Market Scan / Monitor Series (Q1) ▌ Defining and Creating Value from PHM Programs Monitor (Q3) ▌ IT-Enabled Services for PHM Market Trends (Q4)	▌ Bundled Payments: Current Tools and Strategies Market Trends (Q4'18 CAS/ Q1'19 public) ▌ Convergence in Healthcare Monitor (Q1) ▌ Creating and Enabling High Performance Networks Monitor (Q2/ Q3) ▌ RCM 2.0/Payment Integrity Market Trends (Q2/3)

Q4'18: Telehealth 2018: Vendor Assessment and Market Outlook

Lead Analyst: Brian Eastwood

Released: November 2018

Current Status: Published

Abstract

Efforts to improve patient engagement and access to care, coupled with healthcare's ongoing shift to value-based care, has catalyzed a shift in virtual care models. A market once dominated by low-acuity, DTC tech at one end and teleICU units at the other is now filling in the gaps, with a growing number of solutions available to support remote patient monitoring (RPM) and the patient-centered medical home (PCMH). This report will explore various existing and emerging virtual care models and describe the business strategies of the leading vendors in this market.

Inclusion Criteria

> Established and startup telehealth / virtual care companies that have 5 or more HCO clients live on a product

> **Vendors Profiled:** American Well, Doctor on Demand, GE Healthcare, InTouch Health, MDLive, Philips, SnapMD, SOC Telemed, Teladoc Health, TytoCare, Vivify Health, Zipnosis

Q4'18: Bundled Payments: Current Tools and Strategies Market Trends

Lead Analyst: Matt Guldin

Anticipated Release: December (for CAS Clients)

Current Status: Production

Abstract

Episodic or 'bundled' approaches to care and payment are emerging as an important as part of valued-based payments. These models vary depending on payer, providers and type of service. Regardless, managing the efficient delivery and cost as well as understanding performance in a timely fashion will be key to success. This report will examine the vendors that are either taking on risk in partnership with providers or are providing analytic solutions that enable the administration of bundled payments by payers and providers.

Inclusion Criteria

> Vendors are conveners in the BCPI program or selling analytics solutions to enable bundled payment/episode of care.

> **Included Vendors:** Archway, Aver, CareEvolution, Carrum, Clarify, Cerner, DePuy, Epic, Medecision, Medtronic, NaviHealth, Optum, Premier, Remedy, Stryker, xG, Zimmer

Bundled Payments: Current Tools and Strategies Market Trends

Lead Analyst: Matt Guldin

Anticipated Release: January (for GA release)

Current Status: Production

Imaging Analytics Market Trends

Lead Analyst: Brian Edwards, Brian Murphy

Anticipated Release: Early Q1

Current Status: Writing and Researching

Abstract

Radiologists are utilizing advanced analytics more than any other stakeholder in the healthcare system. More than a dozen machine learning applications for imaging analysis have received FDA approval and are rapidly gaining widespread usage at all types of HCOs. In our first MTR focused on AI, we will evaluate and rate the leading vendors developing advanced imaging analytics applications using AI.

Inclusion Criteria

> Established and startup companies leveraging advanced imaging analytics techniques (i.e. machine learning, deep learning, transfer learning) for clinical use cases.

> **Sample of Included Vendors**: Arterys, Butterfly Networks, Enlitic, Envoy.AI, Imagen, Nuance, Samsung, Siemens, TeraRecon, Viz.ai, Zebra Medical

Expertise We're Seeking

> What are the critical considerations for implementing an imaging analytics solution?

> What exactly are radiologists looking for from AI-assisted image processing tools?

Precision Medicine Market Scan Report / Monitor Series

Lead Analyst: Brian Edwards, David Constantine

Anticipated Release: Q1

Current Status: Editing

Abstract

Excitement over the prospect of Precision Medicine has long inspired the expectation that we will someday all benefit from specially tailored medical treatments. As this reality has come into view, some health IT innovators have targeted this opportunity to facilitate this complex addition to clinical practice or other layers of healthcare. We will discuss the landscape with vendor examples and other market stakeholders, accounting for the impact of evolution in sequencing, therapeutics development, digital profiling capability and others for context and consideration of new business models. We will also aim to project the next evolution based on these vendor efforts and converging capabilities in analytics, AI, and new platforms for care management or population health management. *This research will be presented either as a single report, or more probably as a series of topic-specific briefs/mini-reports.*

Inclusion Criteria

> Companies with at least 3 customers in each of 2+ of the use cases covered in the report

> **Included Vendors**: 2bPrecise, Flatiron Health, GNS Healthcare, Health Catalyst, Inspirata, Linguamatics, Orion Health, Syapse, Tempus, Verily

2019 Analytics Market Trends Report Part I – Inpatient and Ambulatory

Lead Analyst: Brian Murphy, Matt Guldin, Alex Lennox-Miller

Anticipated Release: Q1 - Pre-HIMSS

Current Status: Interviewing

Abstract

The scope of this report is the healthcare enterprise and any application of analytics in it, regardless of payment method. It will look at the range of clinical, and administrative challenges that vendors can address for healthcare provider organizations. It will segment the market into inpatient and ambulatory.

Inclusion Criteria

> 3 live customers, $2M+ in revenues for analytics product(s)

> **Sample of Vendors Profiled**: Allscripts, Arcadia.io, Cerner, Change Healthcare, Geneia IBM Watson Health, NextGen

2019 Analytics Market Trends Report Part II – Payer

Lead Analyst: Brian Murphy, Matt Guldin, Alex Lennox-Miller

Anticipated Release: Q1 - Pre-HIMSS

Current Status: Interviewing

Abstract

This companion report will also take an enterprise view of analytics, with a specific focus on products being marketed to payers. It will focus on the needs of payers as they look to incorporate more than just claims-based data in their applications.

Inclusion Criteria

> 3 live customers, $2M+ in revenues for analytics product(s)

> **Sample of Vendors Profiled**: Change Healthcare, Optum, SCIO Analytics, ZeOmega

Convergence Monitor

Lead Analyst: John Moore

Anticipated Release: Q1

Current Status: Researching

Abstract

The ship has sailed and the American healthcare system is locked on a path towards essential cost containment via performance- or value-based care (VBC). This report will define exactly what a converged model of care is and is not; how policy, market trends, and the need to stay competitive are driving this model forward; and specific examples of different types and levels of convergence relationships in existence today.

We will then introduce a model to benchmark the different stages of convergence readiness from both care delivery and healthcare IT perspectives. There will be a discussion on opportunities at each stage to tweak the delivery chain to deliver more value, accompanied by a rough guide to follow as organizations develop their own strategies.

Front Door to Care Monitor

Lead Analyst: Alex Lennox-Miller, John Moore

Anticipated Release: Q2

Current Status: Planning

Abstract

Considerable consolidation is occurring across the provider sector. Concurrently, we are seeing a fragmentation as to how care services are provided. Independent urgent care clinics, clinics in retail businesses (CVS, Walmart and Walgreens), telehealth and even AI-based chatbots are all seeking to become the new *Front Door to Care*. These new models will create opportunities and headaches for the status quo that this Monitor will seek to address providing guidance to all stakeholders along the care delivery value chain.

Creating and Enabling High Performance Networks Monitor

Lead Analyst: Matt Guldin

Anticipated Release: Early Q2

Current Status: N/A

Abstract

This report will discuss how to establish successful high value, high-performance network products. We will look at network establishment from the perspective of the provider, payer, and employer. Physicians and organizations must interact with scores or hundreds of networks for the vast array transactions needed to administer payments, yet many of these systems are still antiquated. This report will dig into the next generation systems looking to address network and performance management.

Payment Integrity Market Trends Report

Lead Analyst: Brian Murphy, Matt Guldin

Anticipated Release: Q2

Current Status: N/A

Abstract

Provider interest in maximizing payments and collections from all sources is increasing. This report will review the technology that helps perfect claims and manages the payment process through to deposit. It will evaluate products for prior authorization, claims denial management, and any precursor processing needed to reduce the likelihood that payment will be denied or delayed. We will talk to vendors with offerings for ambulatory or hospital settings. We will consider how these products are integrated into both clinical and administrative workflows in provider organization. It will evaluated how these products can help improve documentation to support billing as well as analytics and reporting to help identify productive approaches to addressing payment issues.

HIE / Interoperability Market Trends Report

Lead Analyst: Brian Murphy, Brian Edwards

Anticipated Release: Early Q3

Current Status: N/A

Abstract

This report will examine the current state of the market for products that make data available across organizational boundaries in healthcare for application development. It will cover the regulatory and market forces shaping existing and new forms of and organizations that support health data interoperability. It will evaluate the current state of interface engines, MPIs, record location, and messaging. It will also look into the ongoing transformation of the industry from legacy technologies to an API-based ecosystem.

Inclusion Criteria

> 3 live customers and $2M+ in related revenue

> **Sample of Vendors Profiled**: Cerner, CommonWell, Epic, InterSystems, NextGen, Orion Health, Redox

Defining and Creating Value from PHM Programs

Lead Analyst: John Moore, Matt Guldin

Anticipated Release: Q3

Current Status: N/A

Abstract

Going from a big HIMSS-centric buzzword to something more cogent and meaningful has been a challenge for population health management (PHM). Part of the problem arose from PHM being defined as a software product. It is not. PHM is a strategy enabled by technology. Several years hence, PHM is now coming into focus with enough proof points to more clearly define key success factors and IT attributes. The next step - defining key value metrics (ROI) for PHM, which will be a primary focus of this Monitor.

2019 Care Management Market Trends

Lead Analyst: Brian Murphy, Matt Guldin

Anticipated Release: Q4

Current Status: N/A

Abstract

Care Management continues to evolve as providers take on more responsibility including greater care coordination across various care settings, scale their efforts to enroll more of their patients in various programs, and involve more stakeholders including additional non-healthcare stakeholders. This report will look at how vendors are helping providers to meet these emerging and increasing complex needs.

Inclusion Criteria

> 3 live customers, $2M+ in revenues from Care Management product(s)

> **Sample of Vendors Profiled**: Allscripts, athenahealth, Care Evolution, Cerner Corporation, eClinicalworks, Enli Health Intelligence, Epic Systems Corporation, Lightbeam Health Solutions, NextGen Healthcare, Optum, Philips Wellcentive

2019 Engagement Market Trends

Lead Analyst: Alex Lennox-Miller, Matt Guldin

Anticipated Release: Q4

Current Status: N/A

Abstract

Framing for this report is still a work in progress and more information will be shared sometime before the end of Q3.

Inclusion Criteria

> Solution vendors with at least 3 live clients and ≥$2M in revenues

IT-Enabled Services for PHM Market Trends

Lead Analyst: Brian Murphy, Matt Guldin

Anticipated Release: Q4

Current Status: N/A

Abstract

This report is still being framed. More information will be share sometime prior to the end of Q3.

Inclusion Criteria

> Solution vendors with at least 3 live clients and ≥$2M in revenues specifically from IT-enabled business services for PHM.

REPORT TYPES EXPLAINED

Market Trends Report (MTR)

Our signature, Domain-defining report format. The result of 6-9 months of research and writing, these reports scope out our definition of solutions for the covered domain, the major market trends shaping the evolution of these solutions, and evaluates vendors on their ability to deliver on the current and coming needs of healthcare organizations. We release one for each Domain on a 12-18 month cycle. **Retail Cost: $6,000**

Distribution Rights for Vendor Profile: $6,000 for CAS Clients ($8,000 non-CAS)

Distribution Rights for Vendor Profile and Vendors Comparison Chart: $8,500 for CAS Clients ($11,000 non-CAS)

> Finished reports are 80-120 pages.

> Discusses trends influencing changing needs of healthcare organizations, and what innovations/features future solutions should implement to remain a viable competitor.

> Includes full vendor profiles and rankings (typically 15-20 profiles). These are thorough, objective evaluations of the leading vendors in the domain.

> Strongly facilitative for vendor selection process with deep market scan of trends and future considerations, and reviews of vendors' abilities to meet those future needs.

Chilmark Monitors

The Chilmark Monitor is receiving a revamp in 2019. Instead of weekly articles, Monitors will now be formatted as brief reports similar to Insight Reports of past years. These will be less evaluative of vendors and solutions, more focused on defining and discussing major shifts and new trends in certain evolving sectors of the health IT landscape.

Distribution rights: $9,500 ($12,000 non-CAS)

> These reports will be between 10-20 pages.

> Concise, digestible insights from our analyst team.

Chilmark Bights

Chilmark Bights are timely, insightful analyst responses to a recent newsworthy event in the industry. Past topics for Bights have included the 2018 athenahealth acquisition, deep evaluations of the key takeaways from major vendors' user group meetings, Allscripts acquisition of Practice Fusion, etc. *These articles are Chilmark Advisory Service-exclusive content.*

Multi-vendor Sponsored Report (MVSR)

MVSRs are a collaborative, sponsored research effort to help educate the market. We scope out a specific topic that we know is lacking coverage/understanding in the industry and then reach out to vendors working in that space for sponsorship, refining the scope based on vendor feedback. In order to maintain the objectivity of the report, we require 3-5 sponsors before launching an MVSR. Examples of past MVSRs would be APIs for a Healthcare App Economy: Paths to Market Success, and The Migration to Clinician Network Management.

Cost to Public: Free

> Finished reports are 15-25 pages.

> Variable formats based on subject matter and conversations with sponsoring organizations.

> Cost to produce these reports is $75,000. Individual sponsor cost ranges from $15,000-$25,000

> Each sponsor receives a branded copy with full, unlimited distribution rights. All copies have a note in the front thanking all report sponsors, and each sponsor receives a version with just their branding (and ours) throughout the document.

CHILMARK RESEARCH