

# THE HEALTHCARE SUMMIT AT JACKSON HOLE



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## 2022 PROGRAM GUIDE



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## 2022 ROUNDTABLE PROGRAM

**Thursday Afternoon 2 PM – 5 PM MST**

### **Welcome to Jackson Hole**

David Bjork, Chairman  
Healthcare Summit at Jackson Hole

### **Healthcare State of the Union**

Christopher Kerns, VP Executive Insights  
Advisory Board

Advisory Board leadership will examine the most important strategic questions facing healthcare leaders as we emerge from the acute phase of the COVID-19 pandemic. We'll discuss major shifts in influence, purchasing trends, and health policy in the wake of the COVID-19 pandemic and the start of the Biden presidency.

Things you'll earn:

- How the pandemic has (and hasn't) shifted the dynamics of influence and power across the healthcare industry—not only between industry sectors but also within them.
- What the combined forces of the pandemic, Biden administration, and Democrats' narrow majority in Congress mean for the future of the healthcare purchasing landscape.

### **Decision points for 2022**

Christopher Kerns, VP Executive Insights  
Advisory Board

Banish two terms from your mind: "the recovery period"—because the world isn't going back to the pre-pandemic status quo; and "the new normal"—because the new healthcare equilibrium hasn't been found yet. But the decisions of healthcare leaders over the next two years will shape healthcare for a generation. We've identified the major inflection points and decisions leaders will need to make if they want to set their organizations up for success.

Things you'll learn:

- Which structural elements of the industry are in flux during the peri-COVID-19 era, especially the future of telehealth, home-based care, value-based care, transparency, physician partnership, and health equity.
- What actionable steps healthcare leaders can take to shape the trajectory of the major structural shifts underway right now.

### **Networking activity: Our common ground**

Susan Worthy, SVP Marketing  
Optum

## The great site of care shift: Embracing change and winning market share

### Introduction

Christopher Kerns, VP Executive Insights  
Advisory Board

### The future of digital health

John League, Managing Director  
Digital Health Research  
Advisory Board

The Covid-19 pandemic has forced a great leap forward in digital health advancement. In the space of less than two years, digital physician visits have gone from negligible to one out of every five trips to the doctor. In this discussion, we look at a future of virtual-first care, venture funds showering healthcare with cash, and, crucially, an emerging polarity between local providers—who hold sway over patient adoption but aren't convinced about digital health—on one side, and Big Tech—which is making enormous bets on healthcare but not getting much traction—on the other.

### The scramble for ambulatory and home-based care

Amanda Berra, Managing Director  
Advisory Board

Panelists: Kevin Ban, MD, Chief Medical Officer  
Walgreens

Peter Boumenot, Chief Product Officer  
Signify Health

Sally Brooks, MD, Chief Medical Officer  
Kindred Rehabilitation

Michael Hoben, MD, Senior Physician Executive  
Novant Health

Healthcare purchasers have been looking for ways to steer patients to high-value, low-cost sites of care—including the home—for many years as technology has increasingly allowed more and more procedures to be completed in lower-intensity care settings. And the pandemic has added fuel to those efforts as patients increasingly prefer non-hospital settings in seeking care. These changes are heating up the consumer-oriented ambulatory market, as disruptors and traditional providers of every kind build (or re-tool) services to meet consumer demands such as **service affordability, on-demand access to care, and a more tailored service approach**. This discussion will examine how ambulatory-related opportunities and threats are shaping strategy among a wide variety of healthcare players.

### The new rules of behavioral health

Ben Umansky, Managing Director  
Advisory Board

The recent surge in demand for behavioral health services has laid bare a profound mismatch between widespread patient need on the one hand and poorly developed delivery, reimbursement, and coverage structures on the other. In this session, we will discuss possible responses to these make-or-break challenges and explore a vision for behavioral health commensurate with its importance. Among the critical questions facing stakeholders today are these: Will there be an adequate supply of willing and able providers staffing those (and other) channels? Will care pathways properly integrate behavioral and physical health, or simply reinforce old silos? Will incentive structures promote equitable access across diverse segments, or simply reinforce existing disparities?



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