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OUTSIDE LINES



THREE GAME-CHANGERS

Today's Top Pick, Curated for Leaders Changing Healthcare

September 17, 2019

A super wave of change is going on in healthcare – game-changers like Walmart, Teladoc, OptumHealth, and others are moving forward with “serious, we’re not dabbling” strategies for healthcare. In just the last week, three announcements were made. The ripple effects from just one of these is major for healthcare.

In the past week, three headlines stand out as game-changers for healthcare. You may already know about these. Walmart’s new health ‘Super Centers.’ Teladoc driving more and more virtual care. And OptumHealth, the health services division of UnitedHealth, announcing its ‘digital ecosystem.’ The ripple effects from just

one of these is major for healthcare. Collectively, all three together – and with others like them – creates a super wave of big change ahead.

On September 13, Walmart announced the opening of its first ‘Walmart Health’ center in Dallas, Georgia. This marks a new day for primary care. Walmart already has ‘Care Clinics’ in different states, but the new centers are different. While the Care Clinics are 1,500 square feet, located inside Walmart stores, the new centers are 10,000 square feet and they are “super centers for basic healthcare services ... putting key health services under one roof.” Services include primary care, dental, optometry, counseling, lab tests, X-rays, hearing, wellness education, and behavioral health. Walmart already has plans for a second Health Center, in Calhoun, Georgia. A “serious, we’re not dabbling” strategy – Walmart could go nationwide with these centers, majorly changing access to primary and preventive, upstream care.

On September 11, Teladoc’s CEO declared that “virtual care is the great equalizer in healthcare.” This marks the difference that tech-based care is making for health and wellness, primary care, chronic illness management, and other care and supportive services. Teladoc is now serving more than 20 million members. In 2018, the company’s revenues were more than \$400 million. From 2014 to 2018, virtual care usage (via Teladoc and other platforms) was up 600%. The telemedicine market is growing by leaps and bounds, majorly changing the convenience choices and on-demand options for care.

On September 9, HFMA reported on OptumHealth’s new ‘digital ecosystem’. This marks a new way that care will be managed, and referrals directed. In 2011, UnitedHealth launched its Optum division; since, it has grown fast and dramatically. In June 2019, OptumCare, a primary and urgent care delivery services sub-segment of OptumHealth, added mega-size DaVita Medical Group. Overall, UnitedHealth represents 4 out of every 5 U.S. hospitals, 4 out of every 5 employers on the Fortune 500 list, and about 3 out of every 4 health plans, nationwide. All of this is now being linked together, including OptumHealth’s data and analytics engine, which could majorly change downstream access and referrals.

All of this in just one week! These could be game-changing alright. But that’s not all. Other ‘super movers,’ too, are part of the wave of change. CVS has said its new ‘HealthHUB’ concept will reach 4 U.S. metropolitan areas with 50 locations by the

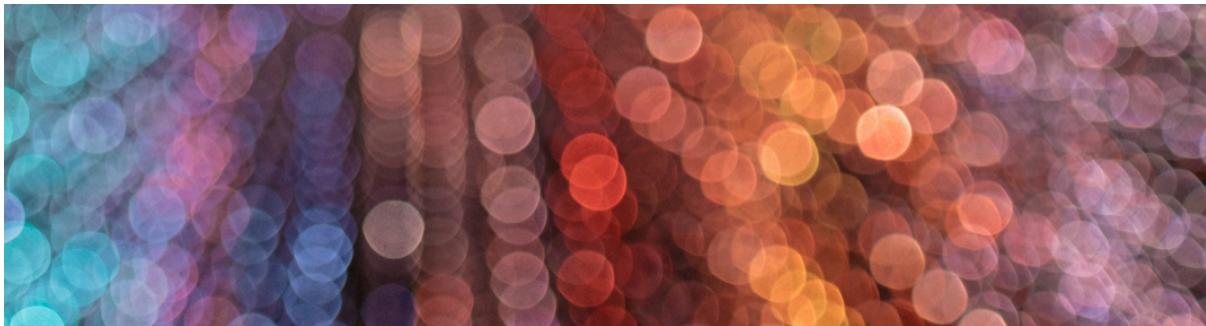
end of 2019, and it will grow to 1,500 locations by the end of 2021. Walgreens is also testing its own primary care models in markets across the country. Even Kroger has announced a 'Kroger Health' strategy. Healthcare leaders, what's the play for your organizations here? Are you holding steady, but ready? Or pursuing your own big, bold moves? There is a lot to think about here.

Always Looking Ahead,
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1-DAY INNOVATION WORKSHOP FOR HEALTHCARE LEADERS

Walmart, Teladoc, OptumHealth, and other new players in healthcare are re-shaping and re-defining how healthcare is being delivered. At Strategy Advantage we've been researching, tracking, and following these trends for years. We believe that healthcare leaders – healthcare strategists, especially – want to be 'in the know' and 'in front of the trends' when it comes to industry shifts and marketplace changes.

We invite you to tap [Kim Athmann King](#) and other of our experts for our [1-Day Innovation Workshop](#). It aims to spark discussion around questions like: What are the marketplace and industry dynamics changing healthcare delivery? Who are the new market entrants/disruptors? How are progressive hospitals and health systems leading with innovative strategies? And, how might your organization pursue new opportunities to energize your strategic vision and priorities forward?

To learn more about the Strategy Advantage Innovation Workshop, contact Kim Athmann King at kking@strategyadvantage.com or call 310/ 416-1400.

ADDITIONAL RESOURCES

Click [here](#) to read more about Walmart's Healthcare 'Super Centers'.

Click [here](#) to listen to a video featuring Jason Gorevic, CEO of Teladoc, describing telemedicine as the 'great equalizer for healthcare'.

Click [here](#) to read more about OptumHealth's 'digital ecosystem'.

Click [here](#) to read more about how many companies – like Walmart, CVS Health, Amazon, Kroger, Walgreens and others – are making game-changing moves in healthcare.

Click [here](#) to access other *Outside the Lines* issues produced by Strategy Advantage.

This bi-weekly e-mail is curated by the expert team from Strategy Advantage and provides a look across the horizon, and outside the lines, of the healthcare industry.

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