

*Thinking About The
Future Healthcare
EcoSystem*

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Thank You . . .

*For your commitment, for your willingness to consider
new ideas, for doing the important work . . .*

You are all idealists and innovators . . . now we have to move to Action

WWA, WWWTB, HWGT

If you don't know where you're going, any road will take you there

Alice in Wonderland

Healthcare is more confusing, more complex and more costly than ever before

Health Consumers

Health Purchasers

Change is Coming Faster Than You Imagine

Next 18 Months will drive next 5 years

Next 5 Years will drive next 25 years

In A Fight Between You & The World, Bet on the World
Franz Kafka

"When faced with a radical crisis, when the old way of being in the world, of interacting with each other and with the realm of nature doesn't work anymore, **when survival is threatened by seemingly insurmountable problems**, an individual life-form -- or a **species** -- **will either die or become extinct or rise above the limitations of its condition through an evolutionary leap.**"

Eckhart Tolle

Frustration leads to a willingness to experiment

Digital worked during pandemic

New market entrants are forcing a reconsideration of what's possible

The Only Two Words That Matter

Experience & Alignment

Today's Experience

Confusing Complex
Costly

Today's Alignment

Non-Existent for Self-
Insured Employers

The Only Two Parties That Matter

Health Consumers
&
Health Providers

Health Consumers

All of us want an experience that matches the rest of our life, that we're excited about and trust

Health Providers

Want to be fairly compensated and want to provide quality results

Great software removes the friction which generally lies between essential elements

Value Added vs. Value Destroying

Who sits in the middle today . . . Payors, PBMs

The Meta Analysis of Profits . . . Greater Than 100% Take

A Trusted Health & Care Experience
+
True Alignment with the Real Payers

1. Create an Experience Health Consumers Love
2. Deliver Measurably Better Care
3. Create Alignment / Shared Savings
4. Remove friction on all sides, not just the health consumer

Who Are The Competitors

com·pe·ti·tion
/ ,kämpə'tiʃ(ə)n/

interaction between organisms, populations, or species, in which birth, growth and death depend on gaining a share of a limited environmental resource

Resources: share, margin, competitive advantage

- Traditional
- Structural
- New Entrants

Amazon
Walmart
Google
Apple
Walgreens
CVS
Tech

The Real Competition: Payers & PBM

Margin

Share

Competitive Differentiation
(only cost)

Create Alternative Business Models, Relationships, Strategies

Go Direct To Employers

Create Differentiated Offerings

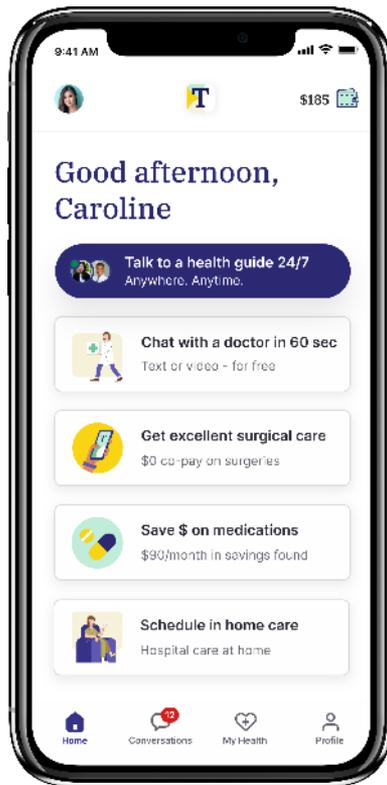
Reduce the Impact of the Middle

Use Data Science, Technology and Design Expertise as a Means

Not just better.
Different.



Unbiased.
Trusted.
Easy Access.



Transcarent empowers Members to stay healthy by providing them with **unbiased information, trusted guidance** and **easy access to high value care** where and when they need it and allowing them to share in the financial benefits of their health decisions.

Providing Unbiased Information, Trusted Guidance, and Easy Access

I need Unbiased Information

Quality Provider Finder

Illuminates high-value, in-network providers

Health Information Center

Evidence-based information and access to a clinician for questions

AI-Powered Symptom Checker

Identifies likely cause and urgency of concern

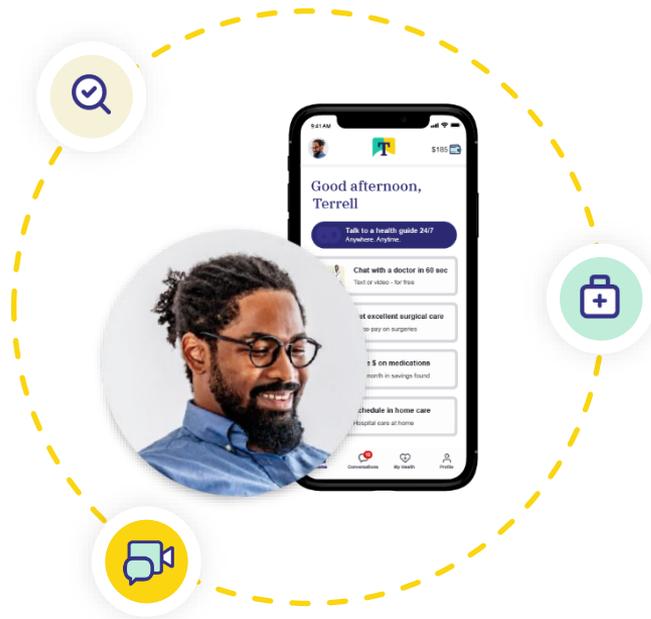
I need Trusted Guidance

Health Guides

24/7 access to dedicated support

Expert Guidance and Support

Review of diagnosis and treatment plan from a best-in-class provider



One-stop Digital Experience

Single stop for all health needs via mobile, web, or phone

I need Easy Access to Care

Virtual Care

24/7 chat/video, unlimited doctor access in less than 60 seconds

Virtual Musculoskeletal (MSK) Support

Remote access to virtual physical care

Surgical Centers of Excellence

High-value surgical care and care coordination

Care at Home

At-home care for urgent/post-acute needs

Additional Care Coming Soon:

Cancer Care (treatment and diagnosis), Behavioral Health Support, and more

Total Alignment

Better Experience

Transcarent improves the value of the entire health and care ecosystem



Promoting **high value providers** within client's existing network reduces total cost of care by 2-8%



Guidance to appropriate sites of care **reduces urgent care and emergency room visits by 40%**



33% avoidance of unnecessary or inappropriate surgical procedures



Increased quality **reduces hospital readmissions by 86% and complications by 80%**



50% savings on surgical care through bundled discounts and appropriate site of care usage that leads to lower unit costs

Our Legacy

Creating A Different Future of Health & Care