

# 2023 Presentation and Workshop Topic Guide

Last update – April 2023



# Helping health care leaders work smarter and faster

## WHO WE SERVE

Hospitals ◦ Health systems ◦ Medical groups ◦ Post-acute care providers ◦ Life sciences firms ◦ Digital health companies ◦ Health plans ◦ Health care professional services firms

200+

EXPERTS ON OUR TEAM

40+ years

OF RESEARCH EXPERIENCE

4,500+

MEMBERS IN OUR NETWORK



Our experts harness a time-tested research process and the collective wisdom of our vast member network to develop **provocative insights, actionable strategies,** and **practical tools** that are at the core of our offerings.

## Research

The knowledge you need to stay current, plus the strategic guidance, data, and tools you need to take action

## People development

Virtual and in-person leadership development, custom learning solutions, and online manager support



# Advisory Board’s expert facilitation offerings



Two types of **live instruction** available to you, either virtual or in-person:

**Interactive presentations**

*Use our experts to educate your team, board, or customers on a selected topic*

- Ideal audience size: 25 – 200
- Session format: 60 – 90 minutes. Virtual or in-person.
- Presentation tailored to meet your learning objectives
- Dedicated time and conversation with an Advisory Board expert

› Select the right topic from 18 options

Topic category	Location in topic guide
Industry-level insights	Pages 5-6
Market intelligence	Pages 7-9
Cross-industry challenges	Pages 10-12

**Facilitated workshops**

*Workshop an issue through guided and interactive discussions, education, and exercises*

- Ideal audience size: <40
- Session format: 1.5 – 4 hours. Virtual or in-person.
- Convene your team, leaders, or board to unravel a challenge or advance a strategic initiative through Advisory Board expert insight, guided conversations, and exercises
- Includes an introduction meeting to understand your learning objectives, scope content, and confirm learning reinforcement activities

› Select the right topic from 8 options

Workshop topics	Pages 12-14
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# Interactive presentations

## Industry-level insights (pages 5 – 6)

- The State of the Healthcare Industry
- Physician Landscape Redefined **UPDATED**
- The State of the Clinical Workforce
- The State of Site-of-Care Shifts
- Understand the Evolution of Health Plan Identity
- The Outlook for Behavioral Healthcare in 2023 **NEW**

## Market intelligence (pages 7 – 9)

- Digital Health Market Trends
- Life Sciences Market Trends
- Pharmacy Market Trends
- Oncology Market Trends (virtual only)
- Cardiovascular Market Trends (virtual only)
- Imaging Market Trends
- Post-Acute Market Trends
- Health Plan Market Trends

## Cross-industry challenges (pages 10 – 11)

- Hard Truths About the Nursing Workforce
- The Future of Home-Based Care
- Fostering Resilient and Adaptive Leaders
- Value-Based Care, Demystified (available starting July 2023)

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# Industry-level insights

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## **State of the Health Care Industry**

*Recommended for all audiences*

We examine the health care industry's increasingly tough business climate dominated by increasing costs, tightening margins, and staffing upheaval. This array of urgent, disruptive market forces mean that leaders must navigate an unusually high number of short-term crises and opportunities—and that strategic choices have an outsized impact on their long-term goals. We'll discuss the market forces that leaders should be watching and the key strategic decisions that maximize health care organizations' ability to influence the industry's future structure.

*Ask us about tailored versions of this presentation, such as: "Employers and the Future of Work", "Organizations Focused on Specialty Care", and "Philanthropy Leaders".*

## **Physician Landscape Redefined**

*Recommended for all audiences*

We survey the physician landscape in the wake of the Covid-19 pandemic and the preceding years of consolidation, innovation, and disruption. We will unpack the host of forces that are shaping the future of physician practice and loyalty, including policy, politics, private sector players, and more. As part of this discussion, we will review a series of commonly held beliefs about the state of physician practice and determine which are true—and which are myths.

## **The State of the Clinical Workforce**

*Recommended for employers of clinicians*

The clinical workforce is at an exceptionally challenging point. Across care settings and roles, organizations struggle to fill vacancies. Turnover is high, and pandemic-driven burnout has exacerbated existing tensions in the workforce. As an industry, we need to know where our employees are going, why, and what we must do to meet the dual needs of our workforce and the communities we serve. In this session, we'll look at the forces shaping the industry nationally and consider how they're manifesting within your local market and workforce.

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# Industry-level insights

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## **The State of Site-of-Care Shifts**

*Recommended for all audiences*

Site-of-care shifts, while not new in health care, are evolving. This presentation will review the top site-of-care shifts that you should be planning for, unpack the drivers behind these shifts, and identify market factors that impact variation. We will also review our projections for the future of the most critical services and procedures. Finally, we'll share response options and strategies for planning ahead.

## **Understand the Evolution of Health Plan Identity**

*Recommended for health plan leaders*

We explore the trends in diversification and vertical integration driving the development of health solutions companies—including not just what this means for large nationals, but how mid-sized and smaller plans can thoughtfully pursue diversification at scale. We will explore the feasibility and goals of different avenues of diversification while envisioning what the health plan landscape may look like in the next 5 – 10 years.

## ***NEW*** **The Outlook for Behavioral Health Care in 2023**

*Recommended for all audiences*

Learn how today's behavioral health crisis impacts key stakeholders across the healthcare industry and identify tradeoffs leaders will have to make to respond to the crisis.

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# Market intelligence

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## **Digital Health Market Trends**

*Recommended for  
all audiences*

Health care organizations have rapidly implemented new technologies in response to the ongoing Covid-19 pandemic. After this flurry of investment, it is only natural for organizations to slow their pace of adoption as they evaluate next steps. This potential lack of urgency, however, can backfire and derail future progress. We'll explore why health care organizations must continue to advance their digital strategies in the face of staffing challenges, changing consumer demands, and an ever-evolving competitive landscape.

## **Life Sciences Market Trends**

*Recommended for life  
sciences and health  
plan leaders*

As the market for evidence continues to evolve, we've selected the trends that we think matter most. We encourage life sciences leaders to keep asking three critical questions to inform planning and prioritization: What are you doing to monitor the most salient market shifts and stakeholder priorities? How are sources, uses, and applications of medical evidence evolving to meet customers' demands for "value"? What internal investments, organizational structures, and skills will be most necessary to succeed?

## **Pharmacy Market Trends**

*Recommended for  
all audiences*

Through this session, we break down the current trends shaping the pharmacy market, how stakeholders across the industry are impacted, and Advisory Board's predictions on where the market is headed. This session can be adjusted to focus more deeply on either retail pharmacies and PBMs, infusion market trends/ provider-administered medications, or specialty pharmacy market trends.

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# Market intelligence

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## **Oncology Market Trends**

*Recommended for  
all audiences*

The peri-Covid-19 era has brought structural elements of the oncology landscape into flux. As such, the future of oncology is uncertain across five key inflection points: health equity, value-based payment, drug costs, site-of-care shift, and workforce. We'll discuss these five inflection points and oncology leaders' unique but time-limited opportunity to influence the direction of these inflection points and shape the future of oncology.

*Available virtual only*

## **Cardiovascular Market Trends**

*Recommended for  
all audiences*

In this discussion, we provide an overview of the key market forces impacting the cardiovascular landscape, providers, and patient care. In particular, we examine the imminent decision points with the power to shape the future of the cardiovascular service line as we emerge from the acute phase of the Covid-19 pandemic. We'll discuss implications for CV service line strategy and stakeholders across the industry.

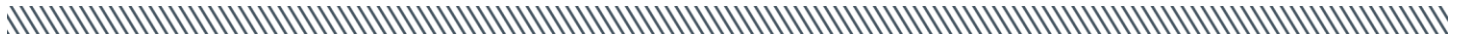
*Available virtual only*

## **Imaging Market Trends**

*Recommended for  
all audiences*

After several years defined by the Covid-19 pandemic, the imaging landscape has changed in various ways. Lingering and emerging market forces continue to disrupt traditional care models, while new challenges (and opportunities) force leaders to adjust their strategies or adopt new ones to succeed in a changing environment. In this session we'll provide a growth outlook for imaging volumes, an overview of the most important trends affecting imaging stakeholders, and the implications for all segments of the market.





# Market intelligence

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## **Post-Acute Market Trends**

*Recommended for  
all audiences*

The Covid-19 pandemic has spotlighted the deeply entrenched challenges impacting post-acute and senior care, providing legitimate reason to expect major changes in the industry as a result of the virus. However, existing market indicators—like increased public attention on post-acute care, expanded use of telehealth, calls to increase post-acute reimbursement, and experimentation of new home-based care models—are not new, but rather long-standing market forces. This presentation will uncover the three accelerating trends impacting the post-acute industry in the wake of the pandemic and how forward-thinking leaders should respond.

## **Health Plan Market Trends**

*Recommended for  
organizations who  
work with health plans*

This presentation provides a refresher on the health plan landscape and explores what health plans care about and how they operate to achieve those goals. This content is intended for organizations who work with (or want to work with) private health insurance companies, also commonly known as health plans or payers. Together we'll discuss who's who at the health plan, what are a health plan's main goals, and how those goals differ based on the line of business.



# Cross-industry challenges

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## **Hard Truths About the Nursing Workforce**

*Recommended for  
health system and  
nursing leaders*

There have been concerns for years about looming supply and demand imbalances in the nursing workforce. The shortage is no longer looming—it's here now, and it's a crisis. In the current workforce landscape, nursing staff are not in the geographies, site of care, or roles where they are needed most. As a result, gaping holes in staffing rosters, prolonged vacancies, unstable turnover rates, and unchecked use of premium labor are now all commonplace. This presentation explores the executive mindset shifts required to combat pressing nursing workforce challenges.

## **The Future of Home-Based Care**

*Recommended for  
all audiences*

Home-based models—including acute care at home, home dialysis, home infusion, and home-based primary and urgent care—hold great promise, but has hype exceeded reality? This presentation will discuss the national landscape of home-based care and specifically where large organizations are placing their bets. We'll also discuss challenges inherent to moving care to the home and offer suggestions for how health care leaders should approach their home-based care strategy.

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# Cross-industry challenges

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## **Fostering Resilient and Adaptive Leaders**

*Recommended for all audiences*

The way health care leaders currently operate is not sustainable—many are experiencing burnout or leaving health care altogether. Today’s increasingly uncertain and volatile environment requires adaptive leaders who can take risks to lead their teams through uncertainty. In this presentation we’ll share tangible strategies you can use to foster an environment that supports resilient leaders, and through them, more resilient organizations.

## **Value-Based Care, Demystified**

*Recommended for all audiences*

The future of value-based care is likely to be physician-centric, but also influenced by the financial realities of provider business climates. We will unpack current plan and provider attitudes on risk-based payment models, major challenges, and strategies for plans to support provider performance in value-based arrangements.

*Available starting July 2023*

# Facilitated workshops

- Examine Digital Inequity and How to Address It **NEW**
- Define Your Role in Making Behavioral **NEW**  
Healthcare Better for All
- Place Your Bets on the Future of Healthcare **NEW**
- Examine the Forces at Play in Healthcare  
*A Root Learning Map® Experience*
- Plan for the Future of Clinical Decision-Making
- Refine Your Sales Pitch
- Future-proof Your Consumer Strategy
- Develop Your Employee Value Proposition

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# Facilitated workshops

**NEW**

## **Examine Digital Inequity and How to Address It**

*Recommended for all audiences*

In this interactive session, you will learn what digital inequity is and why it matters for healthcare. We'll delve into how digital disparities manifest in your community, and you will leave with strategies to promote greater equity across your patient populations.

**NEW**

## **Define Your Role in Making Behavioral Healthcare Better for All**

*Recommended for all audiences*

Explore how your organization can partner to improve the behavioral health care system for all—especially those most vulnerable. Through our interactive sessions, you will learn how today's behavioral health crisis impacts key stakeholders across the health care industry and identify tradeoffs leaders will have to make to respond to the crisis.

**NEW**

## **Place Your Bets on the Future of Healthcare**

*Recommended for commercial, marketing, and/or product strategy teams*

Participate in an interactive market scenario planning session to envision where health care is headed—and reflect on how prepared your organization is for the future.

*Available starting June 2023*

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# Facilitated workshops

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## **Examine the Forces at Play in Health Care: A Root Learning Map® Experience**

*Recommended for all audiences*

Explore the current tensions and dynamics of the health care industry through an immersive and interactive conversation guided by visualization, data, and discussion questions. Together, participants examine the different forces at play across the health care landscape, share how their teams are grappling with them, and consider action steps each stakeholder can take.

## **Plan for the Future of Clinical Decision-Making**

*Recommended for all audiences*

Understand the forces that are making clinical decision-making more complex every day and develop a plan to mitigate the impact. In this workshop, we outline three trends that will influence clinical decision-making in the next 10 years and guide your organization to develop market access and clinical engagement strategies.

## **Refine Your Sales Pitch**

*Recommended for commercial, marketing, and/or product strategy teams*

Engage in a role-play exercise with our experts to review and constructively critique your sales pitch from the perspective of the target customer. Review includes feedback and suggested improvements on overall pitch and product messaging from a panel of Advisory Board experts, using an objective “outside-in” perspective.



# Facilitated workshops

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## **Future-proof Your Consumer Strategy**

*Recommended for organizations who serve healthcare consumers/patients*

Engage in a robust dialogue around how patient preference and behaviors could evolve in the future. Facilitators guide you through a futurism exercise designed to stimulate deep reflection on the implications of these changes, and action-oriented brainstorming on how they could impact your consumer strategy today. Attendees will leave with both tangible action steps for their current consumer strategy and a framework to help guide their future planning analyses.

## **Develop Your Employee Value Proposition**

*Recommended for all audiences*

Explore the forces shaping employee expectations and, with your colleagues, create a unique employee value proposition (EVP) to position your organization as an employer of choice. Facilitators guide you through exercises to identify and articulate your organization's differentiated values.

*Can be tailored for employers of clinical or non-clinical employees*



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