

OUTSIDE THE LINES

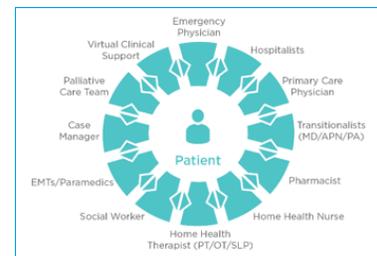
DOUBLE TAKE: THE NATION'S LARGEST MEDICAL PRACTICE

Who is – who has – the largest medical practice in America? Go to the lists of the [top health systems](#) in the country or the [top medical group practices](#) and you might conclude that it's Ascension Health or Kaiser Permanente or Sutter Health or Dignity Health. In fact, [Ascension](#) – with 1,900 locations in 24 states – has 40,000 affiliated and employed physicians. [Kaiser](#) has 18,000 physicians – all part of its employed Permanente group – in 9 states.

One other is [Evolution Health](#), part of Envision Healthcare. While not top of mind, Evolution Health (with access to clinicians in other Envision subsidiaries, EmCare and AMR) represents a 31,000-provider medical practice nationwide. In fact, all things considered, it might be “the” largest medical practice in America. It's different from others. It's an integrated group that combines hospital-based doctors with community-based paramedics, EMTs, nurses, therapists, social workers, mental health professionals, and others. It was formed not out of a health system, but out of an ambulance and emergency services company (Envision Healthcare was formerly Emergency Medical Services Corporation). And its care model is unique. It specializes in bringing healthcare services to people in their homes and alternative settings, and it focuses its care for



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people with complex chronic conditions. Evolution typically partners with other provider organizations, offers hands-on healthcare in 10 states, leverages its resources via a medical command center, and extends its reach through virtual practices and telehealth into 42 states.

Evolution Health is an “outside the lines” type of company that is on the move. Curiously, it formed a joint venture with Ascension in September 2014 to provide home-based post-acute care services for Ascension’s patients. Just a few weeks ago, it announced a partnership with Pager (see more on this below) to provide a new kind of house calls service across the country. It’s a medical practice to watch, and one to know.

Always looking ahead,



Kim Athmann King, MBA, FACHE

NEWS ALERT! WHAT'S HAPPENED THIS WEEK

Last week, Mercy Health joined [ZIGZAG Healthcare](#) as a founding member. Mercy is one of the nation’s top health systems with more than 100 network locations across the Greater Cincinnati area. Welcome Mercy Health! Also, just out from *Harvard Business Review* is a new article titled “[What is Disruptive Innovation.](#)” In this piece, Clayton Christensen and co-authors remind us to be clear about what disruption really is: “a process whereby a smaller company with fewer resources is able to successfully challenge established incumbent businesses.” It’s a good read and one of the key articles featured in our Strategic Innovation practice at Strategy Advantage.

WHO WE'RE WATCHING

Pager is one of the new innovation packets just added to [ZIGZAG Healthcare](#), an online market intelligence tool offered by Strategy Advantage. Touting itself as a new and different entry in the growing realm of telemedicine, Pager is a smartphone app and house calls company that is re-tooling the healthcare experience across America a la “uberizing for doctors.” Founded by an experienced team of entrepreneurs, including the former chief

engineer of Uber, Pager launched in New York in 2014, added San Francisco in 2015, and recently raised another \$25 million and inked a deal with Evolution Health that will power its plans for national expansion. ZIGZAG is a members-only platform focused on new ideas and disruptive innovations in healthcare. Contact Kala (kkascht@strategyadvantage.com) if you want to receive a sample copy of the Pager innovation packet, receive a list of all of the innovation packets featured in the ZIGZAG library, or see a demo of the tool.

WHAT'S TRENDING

So why is a company like Evolution Health, especially with its new Pager partnership, important to watch as one of the largest medical practices in America? There are many reasons, but one relates to the swift-moving trends in telehealth. There are published reports, white papers, and statistics all over highlighting telehealth as a key trend to watch. A November 23 [Forbes article](#) featured a few facts especially relevant for healthcare providers:

- 1) Telehealth visits, which cost between \$40 and \$50 (about half the cost of traditional visits) are gaining acceptance by insurers, employers, and large self-insured employer groups including Midwest Business Group on Health and others.
- 2) The technology has now been endorsed by the American Medical Association.
- 3) Teladoc, one of the big telehealth companies (in business now for more than 13 years) has seen its revenue grow by 70% each year since 2012.
- 4) Of the more than 1 billion ambulatory care visits in the U.S. each year, only about 1 million are tele-visits, however leaders believe that about 30% overall could actually be handled via telemedicine. Indeed, the growth ahead of us in this category will be tremendous.



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