
Practical Tips for a Healthy Outpatient Joint Program

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Market Trends



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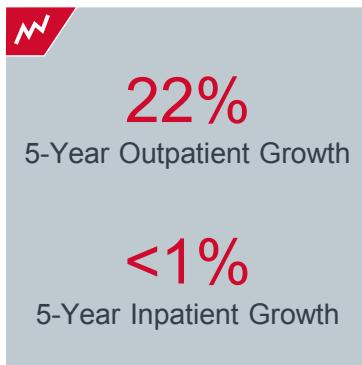
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Current Volumes
Projected Growth
Factors

Outpatient Services Driving Future Orthopedics Growth

Growth Particularly Pronounced for Outpatient Joint Replacement

5-Year Orthopedics Growth Projections



5-Year Volume Growth by Subservice Line

Inpatient and Outpatient, 2017-2022

Subservice Line	OP Growth	IP Growth	Volume Change
Other Orthopedics ¹	29%	9%	6,029,382
Trauma	11%	11%	1,113,899
Foot/Hand	14%	-1%	456,904
Sports Medicine	15%	5%	407,707
Other Surgical Spine ²	20%	6%	240,326
Joint Replacement	104%	-7%	38,501
Medical Orthopedics	--	6%	10,458
Fusion	51%	-3%	10,102
Medical Spine	--	1%	1,218

1) "Other Orthopedics" includes surgeries such as limb reattachments, biopsies, non-spinal fusions, bone removals, and other surgeries that do not readily fall under other subspecialties

2) "Other Surgical Spine" includes vertebroplasties, kythoplasties, drug infusion pumps, spinal biopsies, and other less common spinal surgeries.

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Getting Started

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Be Brave. Be Confident.
Assemble the Right Team
Contracting is Key



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Contracting
Facility Appropriateness
Instrumentation
Sterilization Equipment

Clinical Success

Clinical Success

Proper Patient Selection
Pre-Op Education
Multi-Modal Analgesia



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Clinical Success



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Patient Selection
Home Support
Outpatient Therapy

How to Compete

How to Compete



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Impact of Consumerism
Leverage Self Referrals
Importance of PCP Referrals

Demonstrating Value in a Consumer-Driven Environment

Examples from Advisory Board Consumer Survey Results

20% of self-referral patients chose their ortho physician based on **family/friend recommendation**

A+ Quality

- Make quality metrics meaningful to patients
- Personalize patient services
- Address patient priorities in clinical experience
- Build an alumni referral network

94% of patients say they would choose an institution **charging \$500 less** for knee replacement than an equal competitor

Cost

- Create targeted price transparency
- Partner with payers that waive out-of-pocket costs

30% of self-referral patients named **long distance** as a major factor for not following a PCP's referral to a specialist

Access

- Place program entry points close to patients
- Maximize patient convenience

How to Compete

Educating PCP Referral Sources
Creating a Boutique Experience
Great Surgical Care!



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When do You Plan to Launch Your Program?

- Already Underway
- Within 12 Months
- More Than a Year



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Thank You.