

The Future of O&P

Where are we headed?

Vinit Asar
CEO, Hanger
January 6th, 2018





It's up to us



Before we try and predict the future.....



**...let's take a quick look at the environment
we are in**



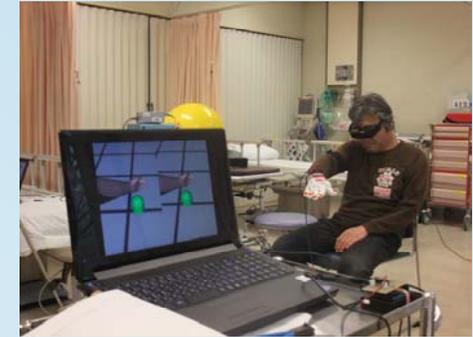
Technological advancements



Exoskeletons



Sense of touch



Virtual Reality



3D Printing



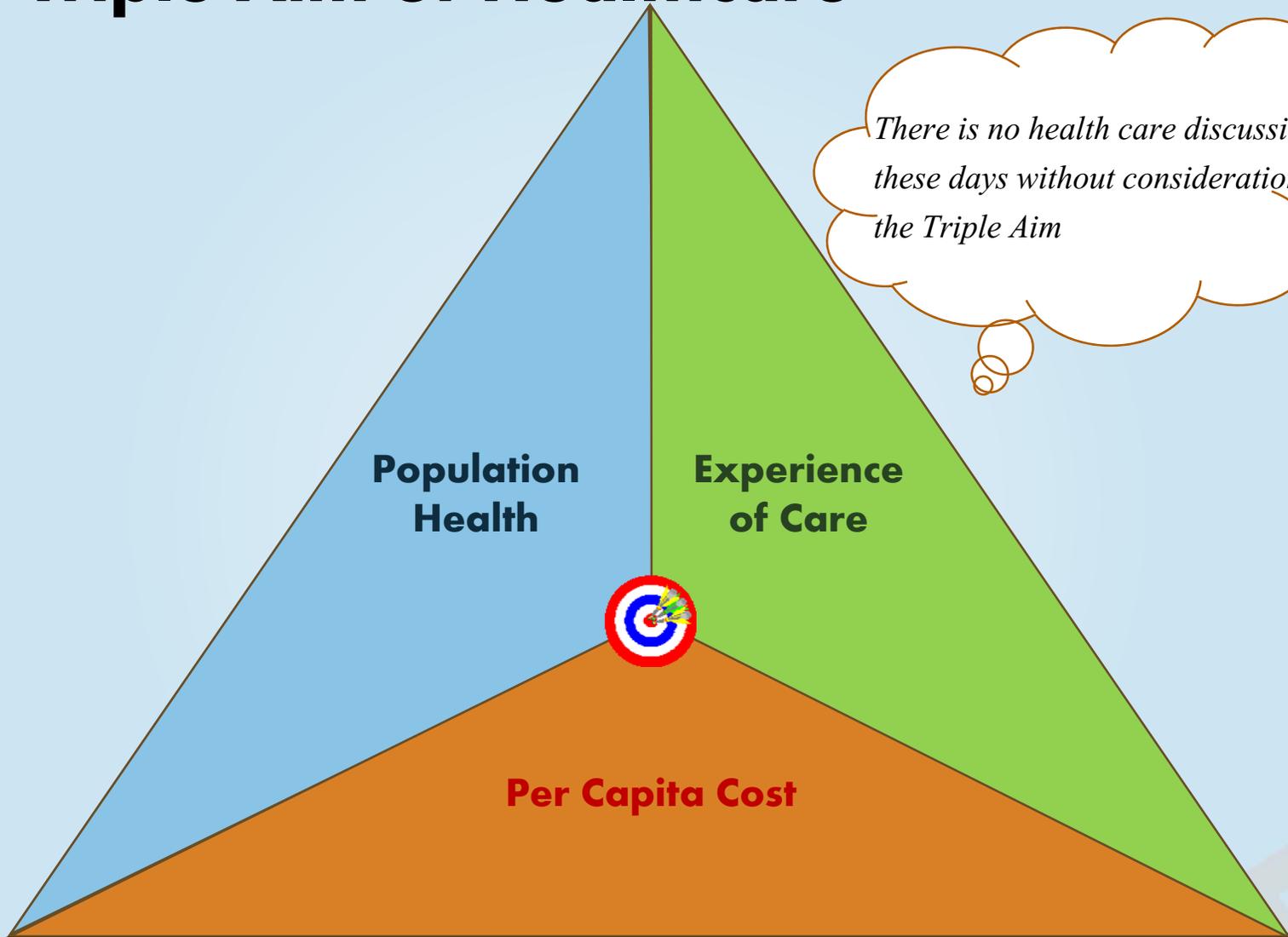
Osseointegration



Remote monitoring and adjustments

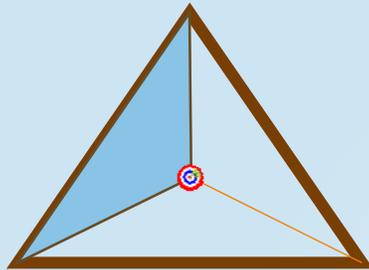


Triple Aim of Healthcare



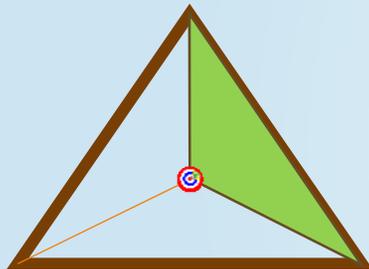
There is no health care discussion these days without consideration of the Triple Aim

...in other words



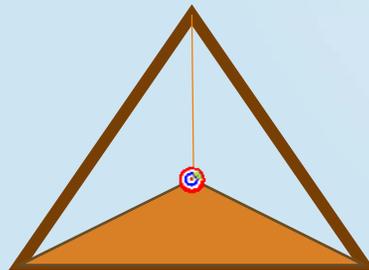
Better Health

Population Health is about generating outcomes!



Better Care

Experience of care is about improving the patient and provider experience of care



Better Value

Per Capita Cost is about reducing the cost of care!

The changing shape of healthcare

Humana, Private-Equity Firms Agree to Buy Kindred Healthcare

“The industry is going through a version of upheaval,” said Kindred Chief Executive, Benjamin A. Breier. “Providers across the country are trying to figure out what their place in the world is going to be.”

Hospital Giants in Talks to Merge to Create Nation’s Largest Operator

Merger of Ascension, Providence St. Joseph would up the ante in face-off between hospitals and health insurers

Warding Off Decline, Hospitals Invest in Outpatient Clinics

As patients increasingly seek cheaper and more convenient care, some of the largest U.S. hospital operators are investing in surgery centers, emergency rooms and urgent care clinics

CVS to Buy Aetna for \$69 Billion, Combining Major Health-Care Players

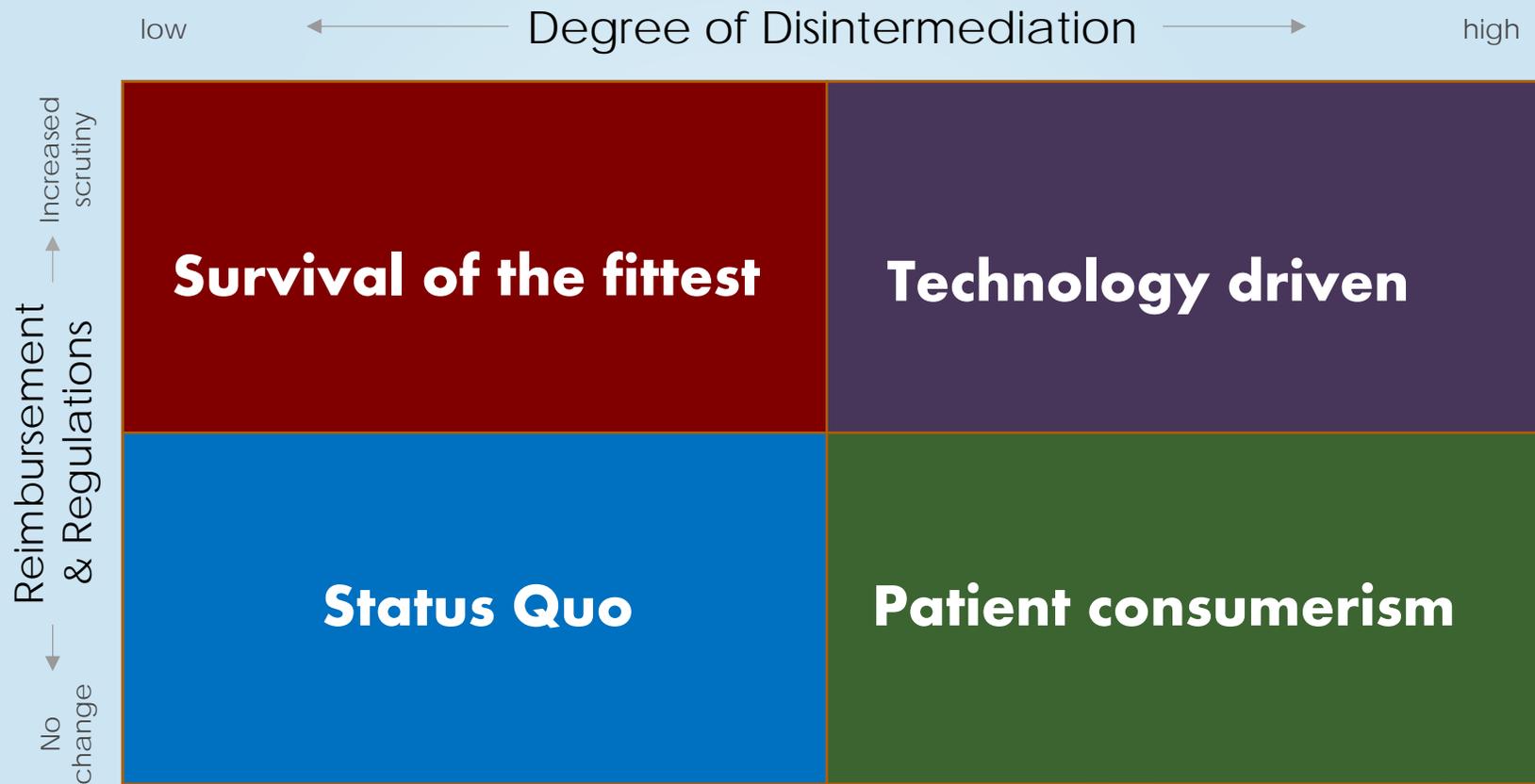
Deal is latest and most dramatic sign of how the lines between traditional segments in health care are blurring

UnitedHealth to Buy Large Doctor Group for \$4.9 Billion

Insurer’s Optum unit has been building up roster of physician practices and clinics



Our scenarios



Now let's try and predict the future.....



Top 6 Predictions of the future

O&P businesses that can truly generate “clean claims” with pristine documentation for the services they provide will thrive

The days of launching premium priced products with no consideration given to outcomes or reimbursement are simply over

Integrated delivery of O&P care will emerge

Patients advocacy will thrive and help with O&P legislation.
Direct to consumer marketing and online supply of commodity products will increase

Technological manufacturing and fabrication advances will likely change O&P practice

Efficient back office functions will allow for excellence in clinical outcomes and patient satisfaction

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It's up to us





The Future is Here

AOPA Leadership Conference 2018

Jeffrey Brandt, CEO

The Future is Here



Embrace Change

- Market drivers

- Healthcare consolidation
- Fee for value
- LCD uncertainty
- Technology advancements

- Industry drivers

- Vertical Integration
- Outcome Measures
- Patient Advocacy
- Clinical Research
- Leadership strength

The Future is Here



Market Drivers

- Healthcare consolidation creating new business models for services
- Healthcare systems and payors moving to fee for value payment plans
- LCD policy changes causing uncertainty affecting commercial payors and patients
- New technology pathways need clinical study evidence for reimbursement support

The Future is Here



Industry Drivers

- Vertical integration within the independent sector is inevitable to build leaner delivery models
- Outcomes measurement, data management and reporting required to support fee for value model requirements
- Engaged patient advocacy at the point of service necessary for patients to secure their devices for timely delivery and reimbursement
- Clinical research for new technologies, and next gen devices, is required to support reimbursement in the future
- Strong O&P Leadership across the profession to drive change and improve value for businesses, clinical equality and patient advocacy

The Future is Here



Your Role in Change

- Be a leader in your company by embracing the headwinds
- Remain active in the current events, news and policy change
- Prepare your business and make necessary changes to get lean, focus on outcomes, educate your staff and patients as you learn
- Support state/federal initiatives to drive best in class decision on healthcare policy reform
- Don't accept less than for a device because it is easier – fight for your patients and your business on reimbursement
- If you choose not to embrace new technology recommend patients to those who do – this continues to raise the bar for the industry



A CHEATER'S GUIDE TO THE FUTURE OF O&P



David McGill
AOPA Board of Directors

Vice President, Reimbursement & Compliance
Össur Americas

WE CAN'T PREDICT

future

and

past



YOUR PROBLEM (TODAY)



the

aSymmetry

of success

PREPARE – DON'T PREDICT



“Don’t look for the
precise and the *local*.”

- Nassim Nicholas Taleb

WHAT CAN KILL YOU?



revenue disruption

clinical disruption

SURVIVAL TECHNIQUES



embrace the new

$$1 + 1 = 2$$

be redundant

expose yourself to serendipity





O&P
Leadership
Conference

AN EXCLUSIVE, BY INVITATION ONLY EVENT