



CHILMARK
RESEARCH

2020 - 2021
ADVISORY SERVICE

WHAT PEOPLE ARE SAYING

“Chilmark were one of the first industry watchers to recognize the importance of population health and are still one of the **most sophisticated** in their appreciation of what is going to be needed to transform health and care.”

– Matthew Swindells, Former SVP Pop Health & Global Strategy, Cerner

“I do my best to write blog posts that separate the wheat from the chaff in the healthcare IT industry. Chilmark reports are a **great resource** to help me understand the major trends.”

– John Halamka, CIO, Beth Israel Deaconess Medical Center

“When I was a CIO, I valued Chilmark’s depth of analysis and their willingness to tell the straight story... they have always been the **most courageous** of the industry analysts, untethered from relationships that could taint their analysis. John and his team at Chilmark make all of us better – vendors and consumers.”

– Dale Sanders, EVP, Product Development, Health Catalyst

“We appreciate Chilmark’s recognition of the strategic value of interoperability, deep analytics and tying cost and profitability to the clinical value-based care equation. There are many complexities involved in our changing healthcare environment and it is our responsibility to usher in a new era of analytics maturity to impact patient lives and business success.”

– Ken Tarkoff, Former SVP & GM, RelayHealth

“Chilmark provides a **thorough, thoughtful, independent** view unencumbered by conflicts and informed by experience, breadth of knowledge, and strong industry relationships.”

– Lisa Suennen, Sr. Managing Director, Healthcare, GE Ventures

“As a CAS Client we have found the research articles Chilmark has provided to be **an invaluable asset in helping us to understand IT market trends** in healthcare, enabling us to better engage our executives with information that is relevant in strategic decision making.”

– Leading Payer Organization, 2+ year CAS client

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2020-2021 RESEARCH THEMES AND AGENDA*

In 2020, we have seen a continued interest in the healthcare IT space as COVID-19 dramatically pushed the industry towards more virtual visits, remote care, and other digital interventions to account for social distancing measures. This was reflected in IT strategy pivots, continued M&A activity, a solid IPO market, and strong VC and PE interest. Chilmark Research will continue tracking these trends, how they effect each of the following research topics and themes, and how it all ties together to enable the shift to value-based care:

FIRST QUARTER

A Path to Value for Population Health: Adopting a Value Chain Model (Free Report)

The Promise of AI/ML in Healthcare: Opportunities, Challenges, and Vendor Landscape (MSR)

SECOND QUARTER

Open APIs in Healthcare: The Future of Data Integration (MTR)

THIRD QUARTER

Revenue Integrity in Healthcare: Solutions Driving Payment Performance (MTR)

FOURTH QUARTER

Engaging Community Resources (SDoH) Market Scan Report (MSR)

Artificial Intelligence Benchmark Report (Insight Report)

Virtual Care Market Trends Report (MTR)

2021 PROPOSED RESEARCH THEMES

Operational Analytics Market Trends Report (MTR)

Care Management Market Trends Report (MTR)

Prior Authorization Market Scan Report (MSR)

Population Health Management Market Trends Report (MTR)

*Calendar is subject to change in response to what we see developing in the industry throughout the year and client input regarding research needs.



ABOUT CHILMARK'S COVERAGE AREAS

It is our core belief that healthcare information technology (HIT) plays a crucial role in improving the quality and efficiency of care delivery if deployed effectively. Every year we look at the changing market dynamics and requirements of this evolving industry and hone in on the technologies and innovations that will most impact the industry over the next 2-5 years. In general, our research topics can be framed within the following Domains:

Analytics

The Analytics domain examines the use of data and applications to improve the clinical, financial, and administrative consequences of decision-making. This includes clinical, operational, and payer-side analytics, as well as Artificial Intelligence, Machine Learning, and Augmented Intelligence.

Care Management

The Care Management domain explores the solutions and services that enable evidence-based, integrated clinical care activities. This includes care pathways, care coordination, remote patient monitoring, disease/condition management bundled payments, and the integration of community services into care planning.

Engagement – Consumer, Member, Patient

Technology that promotes better self-care, education, and personal health management for the individual both inside and outside of a care delivery facility is the research focus of the Engagement domain. This encompasses [self-driven] condition/disease management, telehealth, remote patient monitoring, patient relationship management, and new tools to help simplify and clarify payments.

Interoperability

The Interoperability domain seeks to understand the ever-widening range of interoperability tools and solutions that will deliver data to the application and user where it can maximize value. This coverage centers around HIEs, TEFCA, FHIR and APIs, and integrated developer platforms.

Population Health Management (PHM)

PHM is at the forefront of strategic initiatives being undertaken across the healthcare industry, prompted by the massive shift in risk from payers to providers driven by both legislated and organic payment reform. The PHM domain encompasses aspects of all the four preceding Domains, with a focus on the ability to deliver care to the individual while operationally serving populations.

Provider-Payer Convergence (PPC)

PPC refers to initiatives and technologies that promote more efficient exchange of information between providers and payers as the roles between these stakeholders continue to blur with the shift to VBC. Similar to the PHM domain, these solutions employ components of the first four Domains applied at the intersection of provider-payer relationships. Technologies encompass solutions for all emerging delegated at-risk and joint venture payer/provider business initiatives (ACO, IDN, J/V, etc).

CHILMARK ADVISORY SERVICE BENEFITS

SUBSCRIPTION LEVELS

The Chilmark Advisory Service offers 5 different tiers of service to meet the needs of any size organization and budget. Every subscriber receives regular research notes from the analyst team, the ability to schedule analyst inquiry hours to supplement your internal market research efforts, access to our Report Archive, and live quarterly update webinars where we review recent events and any changing trends that impact the health IT market. Below is a summary of the benefits by tier:

2020-2021 SUBSCRIPTION TIERS

	Tier 3	Tier 2	Tier 1
New Reports	1 MTR or 2 MSRs	1 MTR + all MSRs	All Reports
# of Seats	3	5	5
Analyst Inquiry Hours	4	8	12
Discount on Custom Projects	5%	10%	10%
Discount on Reports	15%	20%	NA
Content Archive	Reports ≥2 years old	Reports ≥1 year old	Full Access
Custom MTR Deep Dive	NA	NA	Included if profiled
Client-only articles	All		
Quarterly Review Webinar	Live (webinar released to public without Q&A 1 week after live session)		
Price	\$13,500	\$19,500	\$35,000

ANALYST INQUIRY SERVICE

One of the unique benefits of your CAS Subscription is that you now have exclusive levels of access to our analyst team. Total hours of inquiry time depends on the choice of subscription tier, but this is often cited as the single most valuable feature of the Chilmark Advisory Service.

These engagements are meant to provide our clients with additional context and insights related to our regular cycle of research – inquiries that would require substantial additional work fall outside of this service and are potentially suited for a custom project.

Examples of analyst engagements that clients have found valuable as part of their subscription:

- > Go deeper on a topic recently covered in a report, Monitor, Quarterly Update, etc.
- > Prioritization of new features / vetting of road map based on our understanding of changing market needs.
- > Evaluation of RFP responses as related to health system needs to aid with vendor selection.
- > Market messaging and/or go-to-market strategy for new offerings/features.
- > Deeper dives into vendor profiles from Market Trends Reports: where to focus efforts to be better evaluated in future reports and how to leverage current strengths to gain greater market penetration.
- > What went wrong at Acme Corp?: Looking at a specific partnership or acquisition and why it didn't work out. How can client look to partner in a way that this wouldn't happen to them?
- > General competitive intelligence needs.

QUARTERLY WEBINAR (New)

In 2020, we are introducing quarterly State of the Industry webinars. These are live broadcasts where the analysts will be sharing any key highlights from their research in the past quarter, major market events that affect their research areas, and what they will be tracking in the coming quarter. Only clients have access to the live broadcast and have the opportunity to ask questions at the end. Recordings, without Q&A will be shared publicly later.

REPORT ARCHIVE

There are approximately 40 reports accessible via the Chilmark Advisory Service client portal, going all the way back to our earliest reports on the iPHR space in 2010. A full list of Chilmark Research reports can be seen in the [Reports](#) section of our website. Tier 1 and Tier 2 subscribers have full access to all content, while Tiers 3-5 have access to all reports at least two years old.

HOSTED WEBINARS

We are always happy to work with clients to participate in a webinar sharing our research as relevant to their own marketing efforts. Tier 1 subscribers are entitled to one webinar included with their subscription. *Note: These webinars must be on topics for which we already have most of the content developed.*

[SEMI-]ANNUAL BRIEFINGS

When any new client joins the CAS Family, we schedule an in-depth, 2-hr briefing between the client's leadership and the analysts that are most relevant to your organization's offerings. This ensures our team knows where your company is at the point of joining CAS, how we can deliver value, and in which reports your organization will be covered. Furthermore, it gives our clients a better opportunity to meet some of the team and receive feedback early on.

After this initial introductory briefing, we like to hold either annual or twice-annual briefings (client choice) to ensure we stay up-to-date with any significant changes occurring at the organization. These briefings often include a discussion about the updated roadmap, any new organization goals, and demos of new functionality. This ensures we are always up to date on the latest developments at our client organizations.

TYPES OF CONTENT EXPLAINED

Distribution rights can be purchased for any of the following content types, except for sponsored projects. To learn more, simply contact [John Moore III](#).

Market Trends Report (MTR)

Our signature, sector-defining report format, typically 80-120 pages long. We typically release updates to these reports on an 18-24 month cycle. **Retail Cost: \$6,000**

- > Discusses trends influencing changing needs of healthcare organizations, and what innovations/features future solutions should implement to remain a viable competitor.
- > Includes full vendor profiles and rankings (typically 15-20 profiles). These are thorough, objective evaluations of the leading vendors in the domain.
- > Strongly facilitative for vendor selection process with deep market scan of trends and future considerations, and reviews of vendors' abilities to meet those future needs.

Market Scan Reports (MSR)

Market Scan Reports (MSRs) examine an emergent, typically immature and rapidly evolving space in health IT. These technologies have the potential to greatly impact care delivery, but are too new or niche to merit a Market Trends Report. **Retail Cost: \$1,495 - \$2,750**

- > Finished reports are 25-35 pages.
- > Examines rapidly evolving, immature market sectors. Presents definition / framework for how to evaluate these emergent product offerings.
- > Contain brief vendor profiles of notable companies providing these solutions.

Benchmark Report (BR):

These reports evaluate a problem being addressed by specific healthcare stakeholders, what different organizations are doing to solve that particular problem, and establishes benchmarks for evaluating these efforts. All CAS clients have access to these reports as part of their subscription. **Retail Cost: \$1,495.**

- > Finished reports are 20-30 pages.
- > Provides frameworks to evaluate organizational progress addressing specific key industry needs.
- > Gives examples of leaders in the space worth emulating.

Insight Reports

These reports are shorter, more narrowly scoped research projects that focus on one specific trend or aspect of current and emerging technologies within our Domains of coverage. **Retail Cost: \$795 - \$1,495**

- > Finished reports are 20-30 pages.
- > Examines a trend or emerging technology trend more narrowly and deeply than possible for MTR or MSR format. Does not include vendor profiles, but will discuss vendor efforts.
- > Topic suggestions welcome!

Domain Monitors/Bights

Concise, deep-dive research articles that discuss recent findings from our analysts (Monitors) or timely reactions and insights related to recent industry news (Bights). Not available for *a la carte* purchasing.

- > CAS-exclusive content. Typically 3-6 pages.
- > Concise, digestible insights from our analyst team.

Multi-vendor Sponsored Report (MVSR)

MVSRs are a collaborative, sponsored research effort to help educate the market. We scope out a specific topic that we know is lacking coverage/understanding in the industry and then reach out to vendors working in that space for sponsorship. In order to maintain the objectivity of the report, we require 3-5 sponsors before launching an MVSR.

Cost to Public: Free

- > Finished reports are 15-25 pages.
- > Variable formats based on subject matter and conversations with sponsoring organizations.
- > Cost to produce these reports is \$75,000. Individual sponsor cost ranges from \$15,000-\$25,000
- > Each sponsor receives a branded copy with full, unlimited distribution rights. All copies have a note in the front thanking all report sponsors, and each sponsor receives a version with their branding (and ours) throughout the document.

MEET THE CHILMARK RESEARCH TEAM

The *only* industry analyst firm focusing solely on transformational trends in healthcare IT. We do not shy away from making tough calls, and are respected in the industry for our research and direct, thoughtful commentary. Below is a reference guide for our team's expertise along with contact information. Feel free to email directly, or contact john3@chilmarkresearch.com to schedule a more in depth engagement.



John Moore, Founder and CEO, Boston MA

1° Expertise Area: Population Health Management, Interoperability, Policy

2° Expertise Areas: Health IT Architecture and Strategy, Interoperability, Clinical Analytics

Email: john@chilmarkresearch.com

Phone: 617.823.3828



Brian Murphy, Research Director and Senior Analyst, Boston MA

1° Expertise Area: Interoperability, Analytics

2° Expertise Areas: Population Health Management, Care Management

Email: brian@chilmarkresearch.com

Phone: 617.230.0623

Schedule a call:



Alex Lennox-Miller, Senior Analyst, Boston MA

1° Expertise Area: Telehealth, Payment Integrity

2° Expertise Areas: Patient Relationship Management, Operations

Email: alex@chilmarkresearch.com

Phone: 617.851.4746

Schedule a call:



Jody Ranck, Senior Analyst

1° Expertise Area: Artificial Intelligence / Machine Learning; Blockchain

2° Expertise Areas: Cloud computing, Internet of Things

Email: jody@chilmarkresearch.com

Phone: 510.333.0597

Schedule a call:



John Moore III, VP of Growth, Boston, MA

Sales, Client support, Product Innovation

Email: john3@chilmarkresearch.com

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Liz Hughes, Marketing, Boston, MA

Marketing, Communications, Press

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RECENTLY PUBLISHED REPORTS

Revenue Integrity in Healthcare: Solutions Driving Payment Performance

Published August 2020

Open APIs in Healthcare: The Future of Data Integration

Published July 2020

The Promise of AI/ML in Healthcare: Opportunities, Challenges, and Vendor Landscape

Published March 2020

A Path to Value for Population Health: Adopting a Value Chain Model

Published February 2020

2019 Healthcare Payer Analytics Market Trends Report

Published November 2019

Primary Care for the 21st Century: Technology-Enabled and On Demand

Published October 2019

Precision Medicine and Health IT: New Data, New Challenges

Published August 2019

2019 Healthcare Provider Analytics Market Trends Report

Published March 2019

Bundled Payments: Current Strategies and Tools

Published November 2018

Telehealth 2018: Vendor Assessment and Market Outlook

Published October 2018

Natural Language Processing: Unlocking the Potential of a Digital Healthcare Era

Published July 2018

Contact john3@chilmarkresearch.com for more information on [upcoming reports](#) or if you see a past report that you would like to access.

ADDITIONAL SERVICES OFFERED

MULTI-VENDOR SPONSORED RESEARCH (MVSR)

When it is clear that there is a gap in the market's understanding of a new technology or the importance of a developing trend, Chilmark Research will work with impacted stakeholders to frame an educational research report for general distribution to the public. Our analysts will come up with a proposal for review by potential sponsors, and then finalize the scope of the research with input from confirmed participants. Sponsors also have the opportunity to review the report draft prior to publication and discuss any concerns or requested changes with the author. These reports include primary and secondary research, and each sponsor receives branded versions with full distribution rights. The report is also distributed free of charge via our website.

Cost: \$15,000 - \$25,000 per sponsor (\$75,000 base cost)

EXECUTIVE WORKSHOP

Our executive workshops are a great opportunity for clients to leverage our domain expertise for specific strategic initiatives. The workshop is a 4-5 hour, in-person session broken up into two parts. Prior to the workshop, we will schedule a call to fully understand the context for the workshop, focusing on the major questions of the client and their current strategic goals. In the first part of the on-site, we will present a market overview, examining adoption trends, the competitive landscape, and industry opportunities. The second part will then focus on the client, evaluating current product and go-to-market strategy, closing with our recommendations on how to move forward.

Cost: CAS Customer \$10,000 (Non-CAS: \$12,500)

STRATEGIC VENDOR ASSESSMENT

This service is specifically for healthcare organizations that are planning technology deployments. We will work with the decision makers in charge of the project to identify the strengths and weakness of the client, helping to prioritize the specific features that will be most instrumental to achieving organization goals. Based on this work, we will evaluate the most relevant vendors that are supplying these types of solutions and create profiles for each to help the client organization make a fully informed purchasing decision. The format of our final deliverable will be scoped at the onset of the project, but will always include recommendations for our top choice and at least one back up option.

Cost dependent upon scope of work

OPPORTUNITY ASSESSMENT

Looking for ways to expand your market share? Have ideas on what to add to your offering, but not sure where to prioritize? Our opportunity assessments involve a deep analysis of market needs with actionable insights delivered at the end of the engagement. We conduct primary and secondary research to identify major market drivers, perform a future-needs assessment including opportunities and market sizing, and conclude with guidance on your go-to-market strategy. Examples of past projects include "Current & Future State of Digital Image Exchange" and "Market for Clinical Quality Measures Solutions."

Cost dependent upon scope of work

COMPETITIVE ANALYSIS

We understand the need for regular, unbiased evaluations of the highly competitive health IT market. We will assess current market leaders and/or competitive vendors of your choice, delivering a profile and SWOT analysis for each, provide advice on your current and future positioning relative to the competition, and recommend the sales tools and methods you can leverage to succeed in growing your market share. We give clients an accurate, objective evaluation of the competition, but will never disclose NDA-protected information whether or not the competitor is a client of ours. Cost for these engagements is dependent upon the number of vendors analyzed and the complexity of the agreed upon evaluation criteria.

Cost dependent upon scope of work

VALIDATION ASSESSMENT

This is an offering geared more specifically towards the healthcare provider side of the industry. We will serve as a trusted 3rd party advisor during the RFP process, assisting buyers with vendor assessments. We will review claims and validate what is true and what is hyperbole, reducing the decision risk inherent with selecting a new IT vendor. With our focus on needs for the future, we will honestly assess the risk of working with specific vendors (ie, vendor viability) and share insights on the deliverability of vendors' product roadmaps. Price dependent upon the solution being implemented and the scope of the project.

Cost dependent upon scope of work

PRESENTATIONS

This category of add-ons encompasses the broadest range of possible opportunities to work with us, as there are many types of presentations that we could potentially give. We have been engaged to deliver keynote presentations at client conferences, Board meetings, webinars, industry conferences (trade shows), etc. This is an opportunity for clients to establish themselves as forward-thinking thought leaders with access to an objective third party. We're confident the audience will leave with an appreciation for the insights delivered.

Cost: \$3,000 - \$10,000

DUE DILIGENCE

This offering is geared more towards the investor side of the industry. We will serve as a trusted 3rd party during the diligence process, evaluating the key assumptions behind the value of a prospective investment, the validity of their claims about market share and / or solution capabilities, true market opportunity for the solution category and the vendor's ability to grow their share, competitive landscape and relative positioning, etc.

Cost dependent upon scope of work

WORKSHOPS

As part of their work, each analyst becomes an expert in any topic they cover. This sets them up to be great leaders of Executive or Sales Team Workshops.

ABOUT CHILMARK RESEARCH

Improving the delivery of care and the patient experience through the effective adoption and use of health IT.

The digital revolution has sparked unprecedented changes in all aspects of our lives. The way business is conducted, information is shared, how we maintain social connections - all are increasingly digitally enabled. Nowhere is the potential for these digital innovations more obvious than in the pursuit of longer, higher-quality lives through advances in the medical sciences. Yet only recently has information technology begun making its presence known in the healthcare sector.

Since 2007, Chilmark Research has been at the leading edge of these advances in healthcare. Our research reports and advisory services have assisted countless organizations in their understanding, deployment and use of digital health solutions. As patients and caregivers ourselves, we are mission-driven to assist decision makers in effectively leveraging technology to improve the delivery of care.

Using a pragmatic, evidence-based methodology with a strong emphasis on primary research, Chilmark Research structures its reports to serve the needs of technology adopters, consultants, investors and technology vendors. In addition to reports for the general market, Chilmark Research performs research for clients based on their specific needs.

In 2012, Chilmark Research launched the Chilmark Advisory Service (CAS) in direct response to clients' request for a continuous feed of research on the most pertinent trends in the adoption and use of healthcare IT. This is an annual subscription that provides not only access to a number of research reports throughout the year, but also direct access to Chilmark Research analysts to answer specific client needs.

Chilmark Research is forward looking, seeking to understand those technologies that have the greatest potential to impact the delivery of care. Current, thematic research categories include – but aren't limited to: Interoperability, Analytics, Virtual Care, Value-based Care, Population Health Management, Provider-Payer Convergence, Care Coordination and Consumerization.

Chilmark Research is proud of the clients it has had the pleasure to serve including 3M, Abbott Labs, Accenture, Anthem, athenahealth, Bain, Cerner, Epic, Google, HCA, Highmark, IBM Watson Health, Kaiser-Permanente, Mayo Clinic, McKesson, McKinsey, Medtronic, Mercy Health, Microsoft, Philips Healthcare, Trinity Health to name a few. It is our hope that at some future date we will have the pleasure to serve you as well.



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