The EAP profession is currently in transformation. Those who get caught in the past and resist change will be forced into commoditization. Those who can create value through leadership, relationships and creativity will transform the industry, as well as strengthen relationships with existing clients.

Needs continue to grow and change. Customers look to the EAP provider to handle the needs. As they ask for more service, a provider wants to say, “you have to pay for each of the services,” but there is always someone right behind saying, “I will do it all,” so the services required goes up and what you can charge stays the same or goes down...thus commoditization. The solution is to move from analog to digital. Jobs and functions need to be standardized, digitized and made easy to perform.

What was said in 2006

1. Change is the norm
2. Traditional EAP is a commodity
3. Internet service delivery increases
4. Less face to face services
5. Predicting workplace needs
6. Free EAP
7. Virtual service delivery

So what was ahead for EAP in 2006?
So what was ahead for EAP

8. Health plan dominance
9. Consumer driven services
10. Coaching will flourish
11. Health and wellness offerings
12. Disease management partnerships
13. Outsourcing will increase
14. Move towards a proactive approach

So what was ahead for EAP

15. Productivity focus
16. International development
17. Risk management
18. Data analytics
19. Partnering for service delivery
20. Operations technology
21. Proof – measure effect of service

So what was ahead for EAP

22. eLearning
23. Absence management
24. More service to more people for less cost
25. EAP becomes a small part of big picture
26. Industry consolidation

2016 and beyond is all about technology

- Review the Health 2.0 and technology landscape impacting behavioral health and EAP
- Share a strategic framework for thinking about technologies that influence outcomes
- Discuss recommendations for screening new technology ideas and how to vet technologies for potential deployment
Health 2.0

- Revolution
- Tech driven collaboration
- Integration of work flows
- Adaptable tech
- Consumer driven, user experience
- Data driven
- Simple, quick and easy user experience

Today we are faced with a real set of challenges that technology can address

- HC tech products are coming from everywhere; every day a new tech launches focused on HC (many with no HC expertise)
- Improving engagement is a universal objective
- We all seek to improve participant outcomes in a cost-effective and meaningful way
- We need to address generational preferences as to how individuals engage in and receive services

Current Trends

“Global mHealth ecosystem worth $16b by 2016, CAGR 40% over 5 years” – 68% is Patient Outreach

- Research and Markets

“Over 90% of individuals worldwide have access to mobile phone services, totaling about 6.8 billion mobile phone subscriptions worldwide”

“Mental Health cost businesses more than $440 billion each year”

- PWC, Emerging healthcare trends, 2015

“Healthcare Internet of Things market segment is poised to hit $117 billion by 2020”

- MarketResearch.com report

Current Trends, cont...

“There are over 1.4 billion smartphones in the world, and smartphone access is expected to triple globally to 5.6 billion by 2019”

“Internet and mobile access is also high and growing among even the most traditionally underserved and vulnerable populations”
We can broadly group healthcare technologies into eight categories.

<table>
<thead>
<tr>
<th>Technology segment</th>
<th>Segment description</th>
<th>Example companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer-based CBT</td>
<td>On-line programs designed to solve behavioral health problems and change unhelpful thinking and behavior</td>
<td>MyStrength, Empower, Dartmouth, Self-Help Works</td>
</tr>
<tr>
<td>Online counseling (chat, telehealth, email)</td>
<td>Computer-based alternative delivery method for counseling/therapy/follow-up, etc.</td>
<td>IESO, American Well, Talkspace, DoctorOnDemand</td>
</tr>
<tr>
<td>Online social network</td>
<td>Use of internet to connect individuals with similar behavioral health issues and concerns and provide virtual support systems</td>
<td>Big White Wall, PatientsLikeMe, OneHealth</td>
</tr>
<tr>
<td>Mobile platforms for self-tracking and support</td>
<td>On-line tools designed as educational and support resources to increase self-awareness/self-efficacy</td>
<td>LifeWIRE, ORCAS, Polaris</td>
</tr>
<tr>
<td>Gaming</td>
<td>Specialized applications on BH issues in a game format</td>
<td>OWLS</td>
</tr>
<tr>
<td>Virtual reality</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Predictive analytics</td>
<td>Extracting information from data and using it to predict trends and behavior patterns</td>
<td>CMT, Predilytics</td>
</tr>
<tr>
<td>Decision support</td>
<td>A computerized information system used to support decision-making of BH interventions/treatment</td>
<td>Cogito, Ginger.io, THRIVE</td>
</tr>
</tbody>
</table>

Goals for our discussion today

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- Share a strategic framework for thinking about technologies that influence outcomes
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The Importance of a Tech Strategy

- Employers are desirous of new technology solutions but lack a focus of what they want to achieve
- A narrow and specific focus helps reduce the noise of a crowded tech market
- A strategy forces realistic expectations and sets objectives for deployment

Components of a Tech Strategy

- **STEP ONE: Deliberate Partner Selection**
  - How to properly engage the right solutions and to identify and vet vendor partners rigorously.
- **STEP TWO: Communicate the Strategy**
  - How to inform clients of what to expect from you and what your technology roadmap consists of as well as how to communicate results openly as one progresses.
- **STEP THREE: Focus on Pilots to Test Partners and Prepare for Scaled Roll-Outs**
  - Participants should never feel a disruption in service, so one must thoughtfully and pragmatically pilot any technology innovations to determine the right technology solution for the right objective.
Five key questions at the core of Beacon’s strategy to drive the health system forward

- How to increase compliance and participation in care?
- How to intervene intelligently in advance of a crisis?
- How to measure and reward high-quality, cost-effective care?
- How to engage communities of support that promote a member’s recovery and maintain stability in the community?
- How to integrate BH care into PCP settings?

We believe that technology can address some, but not all of these areas

CGP: App Selection Actions

- Verify the basis for claims made
- Verify data collection methods
- Verify engagement or retention rates
- Verify if behavior change techniques are incorporated into app
- Verify whether the app verifies motivation to change
- Consider a blended approach with counselor

We’ve vetted and determined focal areas for our technology strategy

Our strategy is born by finding the overlap between where technology can have an impact and the key health questions we are working to impact

<table>
<thead>
<tr>
<th>Impact of technology on Beacon focus area</th>
<th>Member reported outcomes</th>
<th>Intervene before crisis</th>
<th>Support high-quality, cost-effective care</th>
<th>Extend treatment into community</th>
<th>Integrate BH into PCP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer-based CBT</td>
<td></td>
<td></td>
<td>Enable members to access high-quality therapy from their preferred setting (i.e. home)</td>
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<td>Online social network</td>
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<tr>
<td>Mobile platforms for self-tracking and support</td>
<td></td>
<td>Engage members in managing and tracking their behavioral healthcare and communicating care needs through the use of mobile applications, including text messaging services</td>
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<tr>
<td>Gaming</td>
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<tr>
<td>Predictive analytics</td>
<td></td>
<td></td>
<td>Leverage data to develop insights and predict possible implications with our members’ health, especially those who are co-morbid</td>
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<td></td>
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<tr>
<td>Decision support</td>
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</table>

We’re focusing on three high-impact areas to align with our strategy

1. Computer-based CBT and online counseling to extend treatment and help impact cost-effective care
   - Mobile CBT applications that can be directed by a clinician or a member
2. Communication platform to enable member participation in care
   - Technology to send/receive member texts
   - Appointment reminders and follow-ups
3. Measure member-reported outcomes and use claims and other data to know where and when to intervene
   - Technology platforms to survey members, collect responses and feed back to providers for improved care outcomes
   - Analytic engines that use evidence and algorithms to flag where intervention is needed
Goals for our discussion today

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The Limitations of Technology

- It is not a panacea
- Promotion leading to employee engagement with technology solutions is hard
- Question technology vendor claims of positive clinical outcomes – look at the research closely
- Technology solutions are often not priced in a manner realistic to what the EAP market will bear

Screening Process