

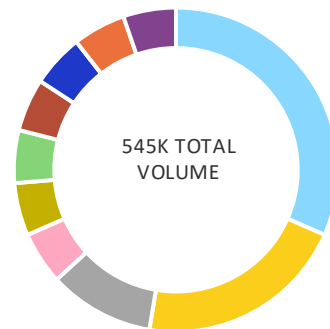
■ CASE STUDY

Large medical center identifies \$50M opportunity to grow their oncology service line

Overview

A strategy team at a large urban medical center wanted to increase its hospital outpatient department (HOPD) and ambulatory surgery center (ASC) market share for oncology in its service area, but they had limited insight into the outpatient market. They needed to understand the best regions to increase the footprint of their oncology service line, which required assessing physician referral patterns for outpatient facilities. With Clarify's analytics, the team leveraged patient journey insights based on inpatient and outpatient data to understand its competitive position in the outpatient space. As a result, they identified a \$50M opportunity to grow their oncology service line.

Volume by Health System



- McCormick Health Care Group
- Ascendancy Health
- Murton Medical Care Company
- New York State Health System
- First Medical Group
- Central Medical System
- Great Lakes Medical System
- Waterford Health Group
- Acme Health System
- Western State Medical Group

Highlights

50K PROCEDURES IDENTIFIED



Within one region the medical center uncovered over 50,000 chemotherapy and infusion procedures being rendered by their competitors.

8M OUTPATIENT AND ASC CLAIMS



With 8M claims in the ASC and outpatient setting for oncology procedures in their market, they had a more precise view of market share.

15 NEW SURGEONS RECRUITED



They identified 15 high-volume oncology surgeons to recruit to capture oncology and oncology-related referral volume from.

■ CHALLENGE

Identifying opportunities for service line growth and expansion

Prior to partnering with Clarify, the strategy team had limited insight into its outpatient market, making it difficult to grow their HOPD and ASC market share. With multiple chemotherapy procedures moving to the outpatient setting, the team needed to better assess their current market position to determine how to increase its footprint and grow referral volume.

The medical center wanted to gather insights in three primary areas. First, the team had to understand their market share across inpatient, outpatient, and professional care settings and how this trended over time relative to the market. Additionally, it was crucial to understand how they were performing relative to the market across the oncology service line by payer mix, location, DRG/CPT code, and site of service (e.g., inpatient versus ASC). Finally, leaders sought to identify primary drivers of outmigration by geography and payer mix for the oncology service line.

■ SOLUTION

Pinpointing actionable opportunities to boost outpatient market share for oncology services

To understand current market share and determine the best opportunities for expansion, the medical center leveraged Clarify's analytics to help providers grow market share across service lines and sites of care. These gave the medical center access to a longitudinal dataset with billions of patient journeys based on claims and social behavioral determinants of health data across over 300 million patient lives. Additionally, they were able to access competitive market intelligence across the inpatient, outpatient, and ASC settings of care, with granular details on specific service lines using their own internal service line mapping data.

Access to insights into service mix, patient mix, site of care mix, and patient share of wallet within each region allowed them to identify which regions had the highest margin volume. This helped them determine the best region to increase their oncology service footprint. They uncovered over 50,000 chemotherapy and infusion procedures that competitors rendered and identified that the top 10 rendering providers make up 95% of referred outpatient infusions from medical oncologists, creating potential partnership opportunities to increase patient volume.

■ RESULTS

Lack of insight into local market rates

The medical center identified a \$50M oncology opportunity within one region and decided to establish a new facility, which gave them actionable steps to grow past their direct competitors. To ensure the success of this new facility, they carefully selected the most ideal geography based on unique patient-level details in that region to maximize return on investment. They also extended offers to the top 15 physicians in the market to join their new facility, aiming to boost patient volume for in-network, high-performing oncology surgeons handling chemotherapy, infusions, transfusions and related procedures.

About Clarify Health

Clarify unlocks the hidden value in healthcare data. Trusted by providers, payers, tech and services, and life sciences companies, Clarify uses the power of data and AI-powered predictive analytics to make complex decisions easier. The Clarify Atlas Platform® is the foundation, leveraging the industry's largest and most robust dataset to map more than 300 million lives and 20 billion data points to surface actionable insights with unparalleled speed and precision.