



Purpose

- Provide a review of the market
- Give an overview of the market segments for WISHIN Direct
- Outline the marketing and communication activities for WISHIN Direct
- Identify the communication channels to promote WISHIN Direct

Executive Summary

This document contains background information on WISHIN Direct, communications considerations, outlines the market segments and provides an action plan for 2011.

WISHIN Direct will enable health care providers, clinics, hospitals, pharmacies and labs to exchange health information securely to known and trusted recipients over the Internet. The product will enable medical providers and health care organizations to meet Meaningful Use requirements in an easy and cost effective manner. For less than a monthly cell phone bill medical providers using WISHIN Direct will be able to exchange health information to other providers through the Wisconsin state appointed health information exchange (HIE). From July to the product launch, WISHIN intends to focus on pre-selling WISHIN Direct to the market segments that are deadline driven to meet Meaningful Use requirements. It's essential to these segments to meet compliance and collect federal incentive payments or risk the loss of a potential revenue source.

In 2011, WISHIN will provide WISHIN Direct services and have agreements with HISPs that want to connect to WISHIN. In 2012 and beyond, WISHIN will adopt future WISHIN Direct standards, roll out additional value-added services and continue to expand the customer base.

Developing the WISHIN Direct (the HISP) brand as the statewide health information exchange that will eventually bridge to the National Network, validate user identity, issue direct addresses and use a provider directory is a complete solution. WISHIN Direct will be the solution helping providers meet all parts of Meaningful Use health information exchange requirements.

While Meaningful Use, Stage 1 requirements for HIE are minimal, future stages will be more stringent in nature and will require greater interoperability capabilities. One of the selling points for WISHIN Direct is the intention of the organization to develop an infrastructure to help meet the Meaningful Use demands. WISHIN Direct will be promoted as the initial product of a more robust HIE offering in Phase 2.

Market Overview

Wisconsin is progressive in the adoption and use of health technologies that improve health care delivery and patient safety and outcomes. As a result, opportunities exist for WISHIN to successfully launch HIE services in the state. Some of the market has used their electronic health record (EHR) or HIE vendors to meet the Stage 1 Meaningful Use requirements. Those meeting with the exchange requirement with EHR have only solved HIE for the short term. While those potential customers within the market that are already



meeting Meaningful Use requirements through other venues, WISHIN Direct will be able to offer customers a HIE solution, as the statewide health information network.

Barriers	Action Steps
Overcoming market concerns of rolling out a product close to the Meaningful Use deadline—year 1	<ul style="list-style-type: none"> • Pre-selling WISHIN Direct allows potential customers to make an informed decision when selecting ways to achieve their Meaningful Use requirements for HIE • Promotion: Sign up for WISHIN Direct in 2011 and use the service for free until January 2012
Selling the WISHIN Direct prior to developing a pricing structure	<ul style="list-style-type: none"> • Collateral material will promote an identifiable cost range for the product price point, which allows the customers to identify and budget for the cost of the product in 2012
Other HIE activity in the market place	<ul style="list-style-type: none"> • WISHIN Direct messaging will articulate the difference between just meeting year one HIE Meaningful Use requirements and finding a solution for the ongoing requirements

Market Segmentation

Many stakeholders in Wisconsin can potentially benefit from WISHIN Direct. Market segments for the product include physician/physician practices, independent hospitals, integrated delivery networks, laboratories, pharmacies and payer groups. Physicians/physician practices and independent hospitals will be the primary market segments targeted during the initial marketing push. Below are six market segments for WISHIN Direct.

- **Physicians/Physician Practices:** Approximately 13,500 physicians (source: WI Medical Society) are practicing in Wisconsin. WISHIN will offer services to physicians and physician practices that could help them realize efficiencies in their business and achieve Meaningful Use requirements for HIE. 6,750 of the of physician practices in state are not hospital-based physicians (source: WI Medical Society)

- **Independent Hospitals:** Benefits of the HIE services to Independent Hospitals in Wisconsin would include the ability to communicate with physicians, labs, and other hospitals. Additionally, the ability to streamline reporting functions, gain administrative efficiencies, and exchange data electronically with outside entities make Independent Hospitals a key stakeholder. Wisconsin has 126 hospitals in the state.
- **Integrated Delivery Networks:** Integrated Delivery Networks (IDNs) in Wisconsin are widely known for their existing high level of EHR adoption. However, planned HIE services to be offered by WISHIN were identified by the IDNs as being of value. The ability to exchange data electronically with physicians, labs, and other hospitals not affiliated with their network is a need. Marketing to the IDNs will be customized to each entity—revolving around the needs of the individual entities. Below is a list of IDNs in Wisconsin.
 - Aurora Health Care
 - Wheaton Franciscan Healthcare Southeast Wisconsin
 - Marshfield Clinic
 - University of Wisconsin
 - Meriter Health System
 - Affinity Health System
 - Gundersen Lutheran Health System
 - Mercy Health System
 - Dean/SSM
- **Laboratories:** During the “white space” analysis, DHS identified laboratories with capabilities to send results electronically and those that are currently not sending results electronically. The white space includes those reference laboratories not currently sending their results electronically outside the walls of their organization. This segment amounts to 41% (114 laboratories) in Wisconsin with the capability of sending results electronically. This segment also represents the potential target market for WISHIN Direct in the near-term; with more advanced bi-directional HIE service offerings to be provided over time. At this time laboratories are not being incentivized to adopt electronic health information exchange.
- **Pharmacies:** Wisconsin currently has 41 pharmacies that cannot accept electronic prescriptions. This is a small group, but is still part of WISHIN’s white space. Similar to the laboratory market segment, pharmacies also have no financial incentive to adopt electronic health information exchange. There will be limited marketing effort dedicated to reach this segment.
- **Payers:** While payers are not a primary market segment, payers in Wisconsin have approximately 5.4 million covered lives in the state. Payer organizations represent a market segment who could leverage and utilize the services provided by WISHIN. As potentially significant beneficiaries of HIE, participation by payers represents a key source for sustainability. Education of WISHIN Direct services is important to this group. Targeted communications and education for this group will become more important in Phase 2 of WISHIN Direct. The following is a list of top health plans in Wisconsin by their market share (Health Leaders, 2010):

- UnitedHealth Group, Inc. - 23.4%
- Other - 22.7%
- Dean Health Plan, Inc. - 10.7%
- WellPoint, Inc. - 9.2%
- Humana, Inc. - 7.4%
- Security Health Plan of Wisconsin, Inc. - 7.3%
- Affinity Health System - 6.8%
- Physicians Plus Insurance Corporation - 4.7%
- Unity Health Plans Insurance Corporation - 4.1%
- Centene Corporation - 3.7%

Framework for Key Messages:

Physicians/Physicians Practices:

Message: It's affordable for the practice

- Helps you easily meet HIE meaningful use
- Provides greater connectivity
- Allows you to make more informed decisions—with more information
- Smooths transitions of care
- Will provide a single pipeline of secure health care information for all of Wisconsin
(Eventually connects you to other states and nationally)
- Tailors services to meet Meaningful Use requirements and market needs specific to Wisconsin

*WISHIN Direct allows you to: Connect with the Statewide HIE to exchange health information
& Achieve meaningful use*

Independent Hospitals:

- Connects hospitals to the Statewide HIE to achieve better patient care
- Provides stronger overall connectivity within Wisconsin
- WISHIN is the statewide health information network
- One solution connects you to WISHIN
- Smooths transitions of care
- Connects hospitals to where health information exchange requirements are going
(Important for reimbursement and value based purchasing in the future)

Independent Delivery Networks:

**Messaging for the IDN group will be customized to each organization*

- Connects users to the Statewide HIE to achieve better patient care
- Provides stronger overall connectivity within Wisconsin
- WISHIN is the statewide health information network and one solution connects you to the statewide network
- Helps to improve quality of care
- Smooths transitions of care reform
- Connects users to future requirements of health information exchange and health care reform

Laboratories:

- Replaces faxing and migrates to electronic health information exchange
- Allows you to connect electronically with independent physicians
- Provides connectivity with Wisconsin Division of Public Health for reportable conditions
- Call WISHIN, create one interface, and save money.

Pharmacies:

- Physicians will be required to send a certain percentage of prescriptions electronically to comply with meaningful use. To stay competitive you need to have an HIE solution: WISHIN Direct.
- WISHIN Direct provides your customers (physicians) easier access
- Helps you keep up with the competition/market place
- Connects you to the pipeline of health information exchange
- Helps you migrate to electronic prescriptions (e-prescribing)

Recommendations

WISHIN will take a multi-prong marketing and communication approach, using targeted messaging with each market segment. WISHIN staff will work with stakeholders, using their channels to disseminate information in print, e-newsletters, meetings, education or training sessions and vendor fairs.

Communications Considerations

We plan to use the resources and respected communication channels of the Wisconsin Hospital Association and Wisconsin State Medical Society (print and electronic newsletters, websites and meetings) to reach physicians, physician practices, clinics, hospitals and independent delivery networks in the state. WISHIN is also planning to work with WHITEC to produce a series of interactive webinars using their technology, which will then be hosted on WISHIN's newly updated web site.



Key Messages (See market segment break down)

Execution Recommendation

The primary focus of WISHIN Direct in the initial phase is helping providers achieve Meaningful Use objectives. Due to the timeline and the WISHIN Direct product launch date, the pre-sale of WISHIN Direct will be essential and allows the implementation team to line up a customer base prior to the roll out of the product. Sales sheets will be developed for WHITEC and the WISHIN Outreach Coordinator that outline product benefits. Physicians and physician practices have been identified as the first market segment to be targeted and once online will help provide a base of WISHIN Direct users and help establish critical mass.

WISHIN plans to leverage stakeholders in an advisory capacity, use their contacts, channels, and communication resources to effectively distribute the messages about WISHIN and product offerings. WISHIN will prioritize communications for the WISHIN Direct product to physicians, clinics and hospitals that are eligible for Medicare and/or Medicaid incentive payments.

Action Plan

Activity	Timing	Responsible
Section 1		
<ul style="list-style-type: none"> • Create marketing tool kit (collateral materials) for Stage One HIE Meaningful Use <ul style="list-style-type: none"> ○ Develop a leave behind "Sales Sheet" ○ Develop a brochure - Steps to Connect, Adopt and Achieve Meaningful Use ○ Develop a outline or visual why WISHIN Direct over other products ○ Provide a business case for WISHIN Direct • We are WISHIN (Helps to sell the importance of the organization) 	<p>July</p> <p>Done</p> <p>July</p>	<p>Johnston & CEM Committee</p> <p>Doeringsfeld</p> <p>Johnston & CEM Committee</p>
<ul style="list-style-type: none"> • Use stakeholder communication channel opportunities: Create a channel list and timeline. 	Current	Johnston

Section 2		
<ul style="list-style-type: none"> • Position WISHIN’s web site to sell to different WISHIN Direct markets <ul style="list-style-type: none"> ○ The website will act as one of the primary sales tools 	Complete by July 15, 2011	Johnston & Yahara Software
<ul style="list-style-type: none"> • Develop a series of webinars on WISHIN Direct to be hosted on the WISHIN website 	Developed and taped prior to Meaningful Use deadline	Johnston, CEM Committee, WHITEC
Section 3		
<ul style="list-style-type: none"> • Educate stakeholders on market segment messaging 	3 rd Quarter	Johnston & CEM Committee Members
<ul style="list-style-type: none"> • Develop WISHIN Direct messaging for stakeholders <ul style="list-style-type: none"> ○ Talking points ○ Elevator speech ○ Meaningful Use diagram • Develop a PR strategy to elevate WISHIN Direct Marketing efforts 	July 20, 2011 August 5	Johnston & CEM Committee