cegedim

December 11, 2018

9th Investor Summit

Cegedim, a partner of choice for the digital transformation of the healthcare sector.

Cegedim DIGITAL

01 **Introduction**

Laurent Labrune
CEO, Cegedim

02 **Healthcare in Digital Transformation**

Jan Eryk Umiastowski
Chief Investment Officer
Head of Investor relation

03 **In practical terms, how is Cegedim revolutionizing the healthcare industry?**

Cegedim

DIGITAL

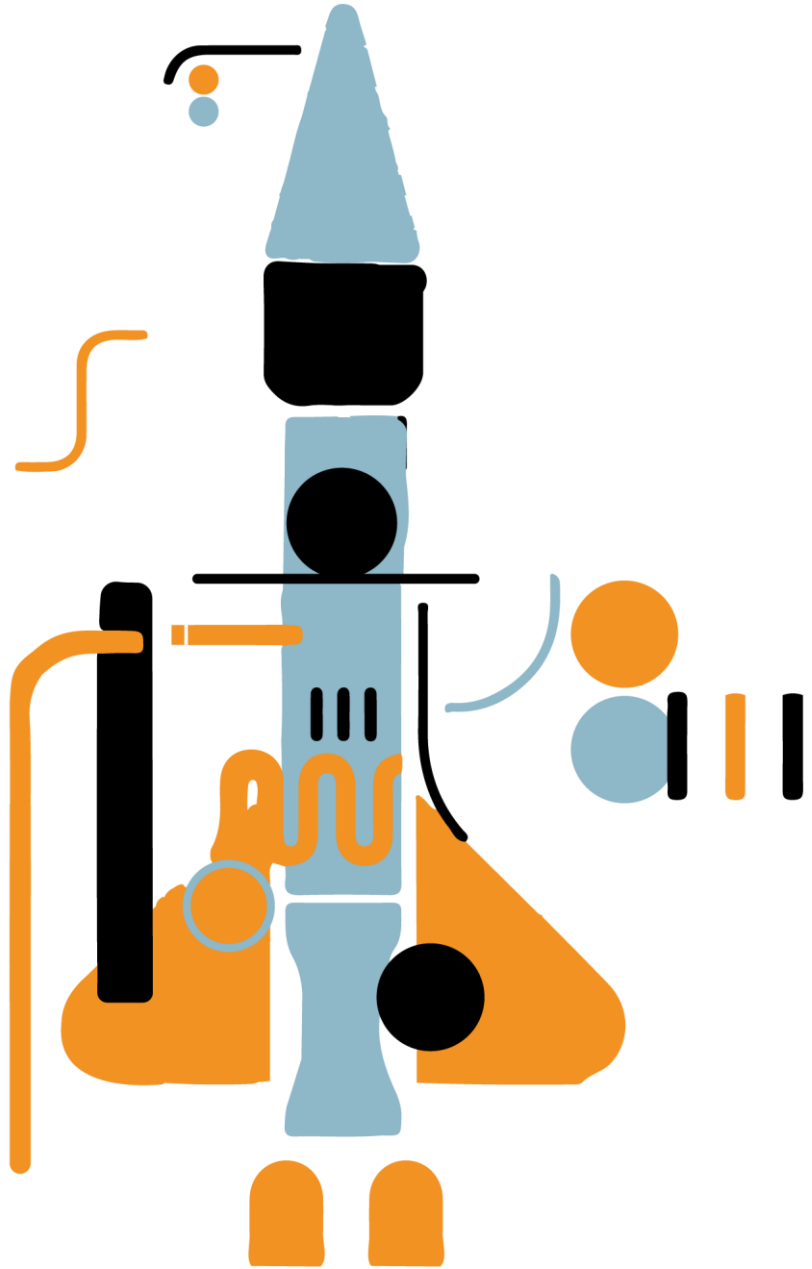
Introduction

Laurent Labrune
CEO Cegedim Group

Cegedim DIGITAL

Healthcare in Digital Transformation

Jan Eryk Umiastowski
Chief Investment Officer
Head of Investor Relation



- Historically, **digital transformation** was used to define the fact of turning paper into digital information: **digitization**.
- **Digitization does not equal digital transformation**
- Digitization is needed in order to optimize in a digital transformation

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Digital transformation is much more than disruption or technology

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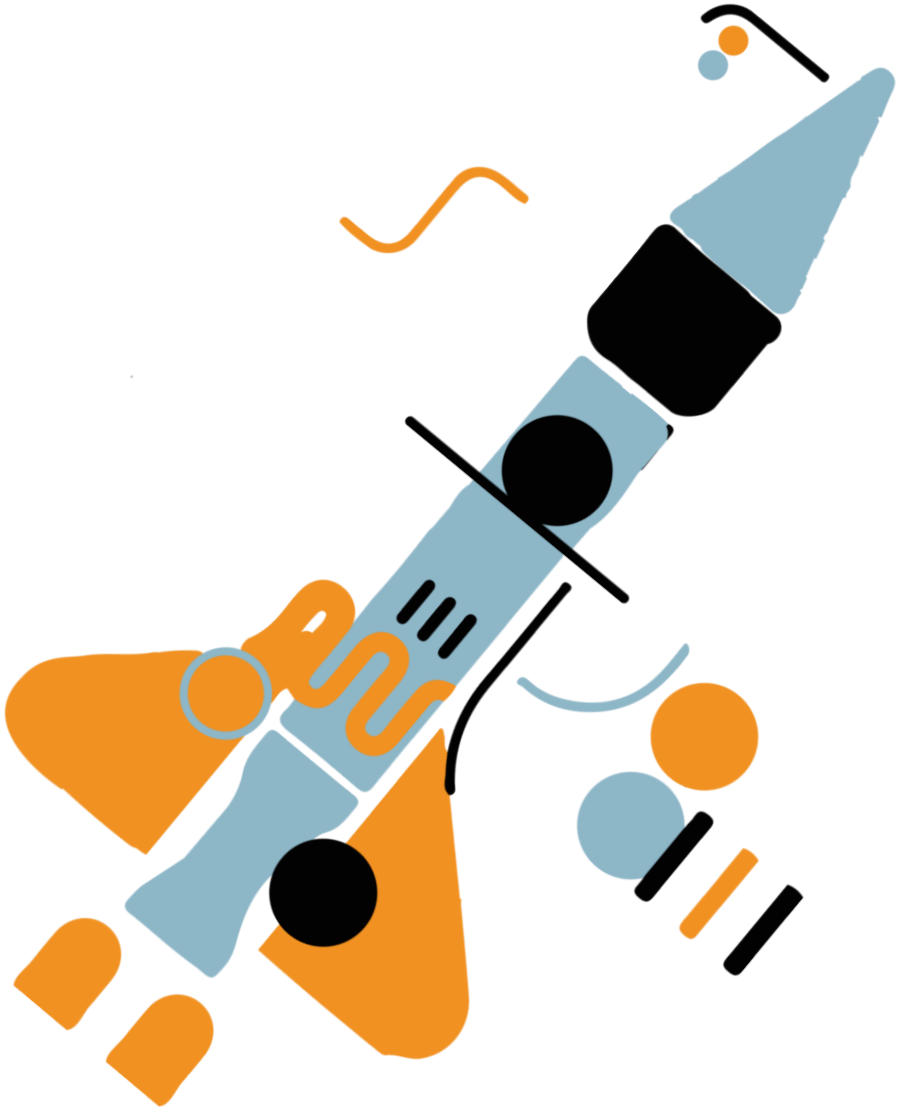

DIGITAL
Transformation

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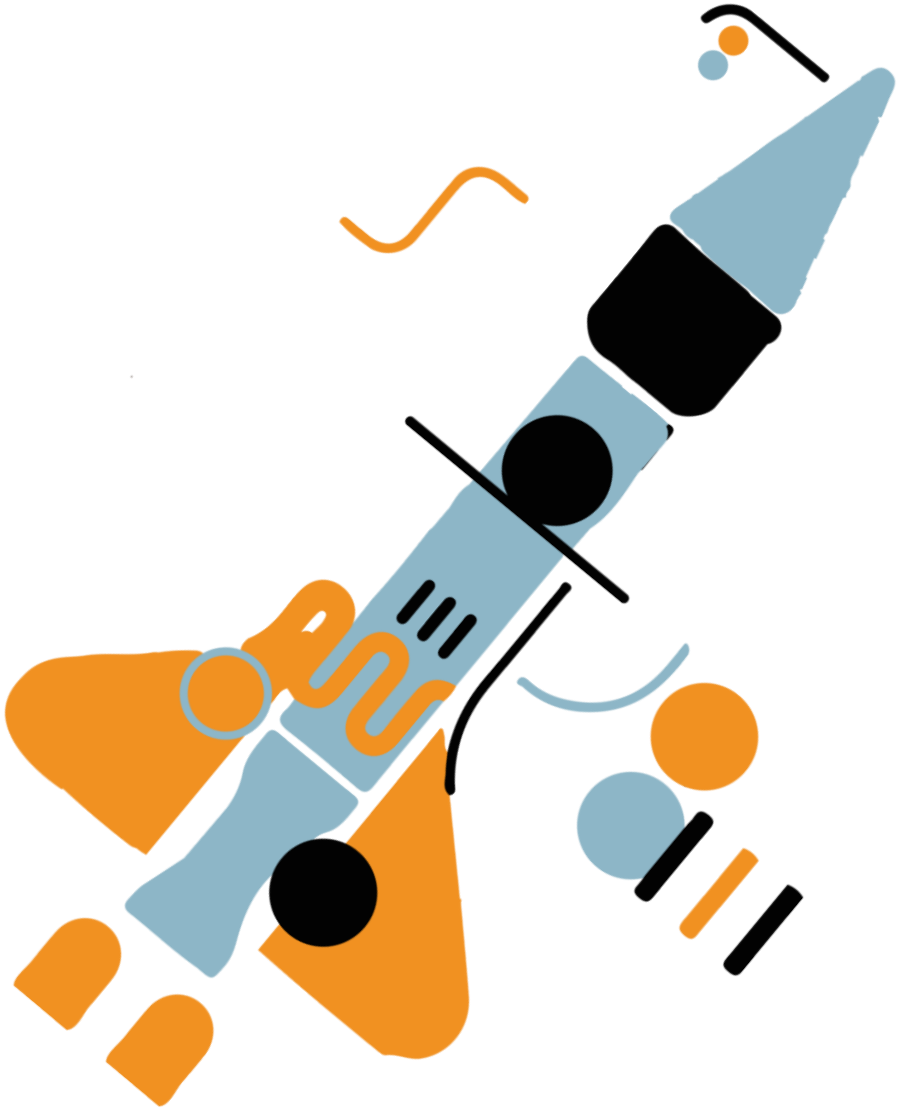

Rethinking business model and processes….

To become more efficient or effective

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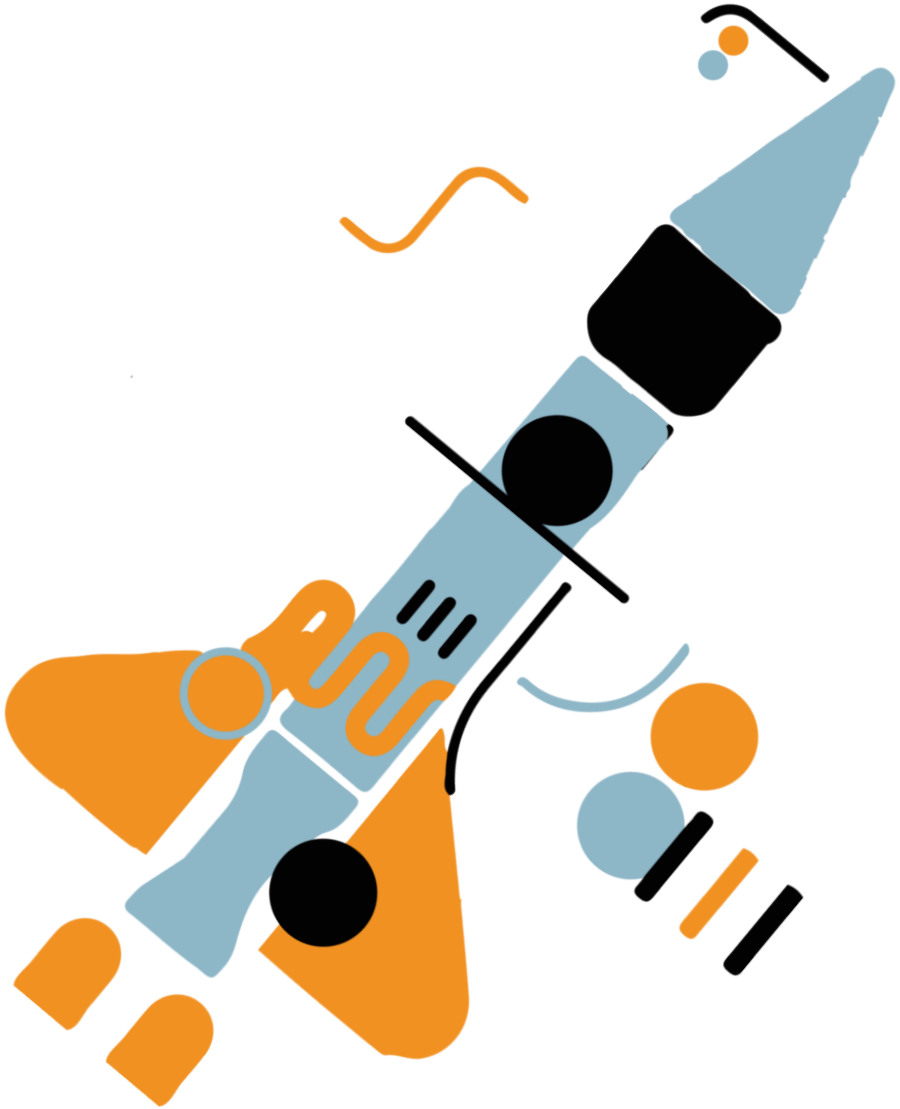

Not replicate an existing service ….
In a digital form

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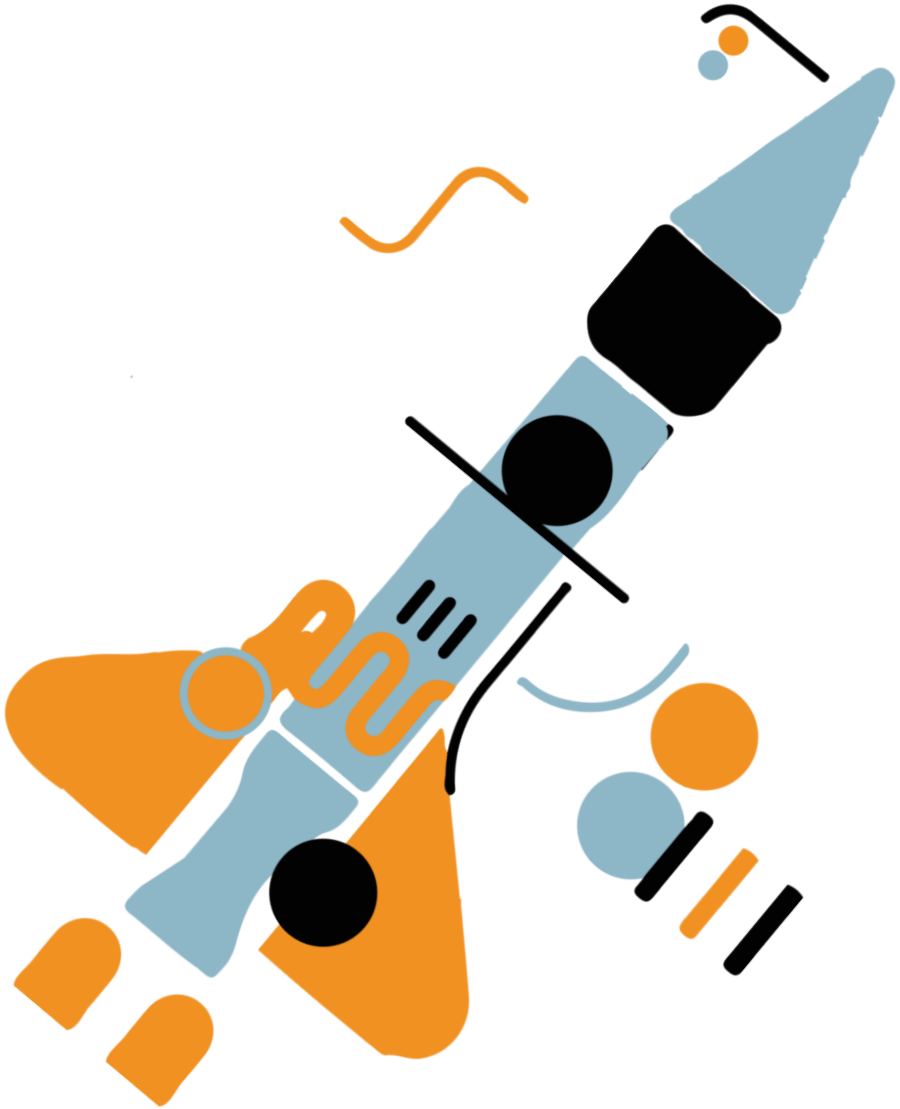

But use technology to transform that service into something…
Significantly better, new

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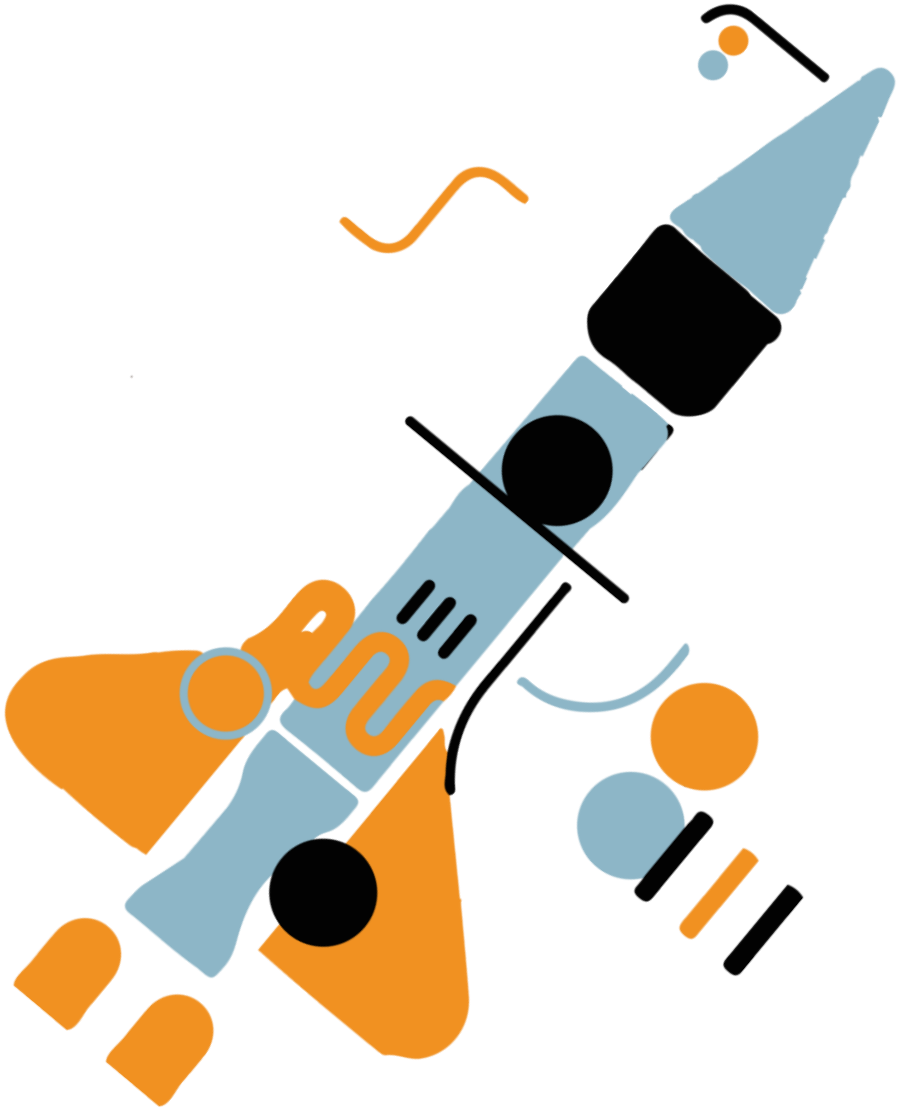

Essential aspect of digital transformation:

Interdependency and interconnectedness of everything

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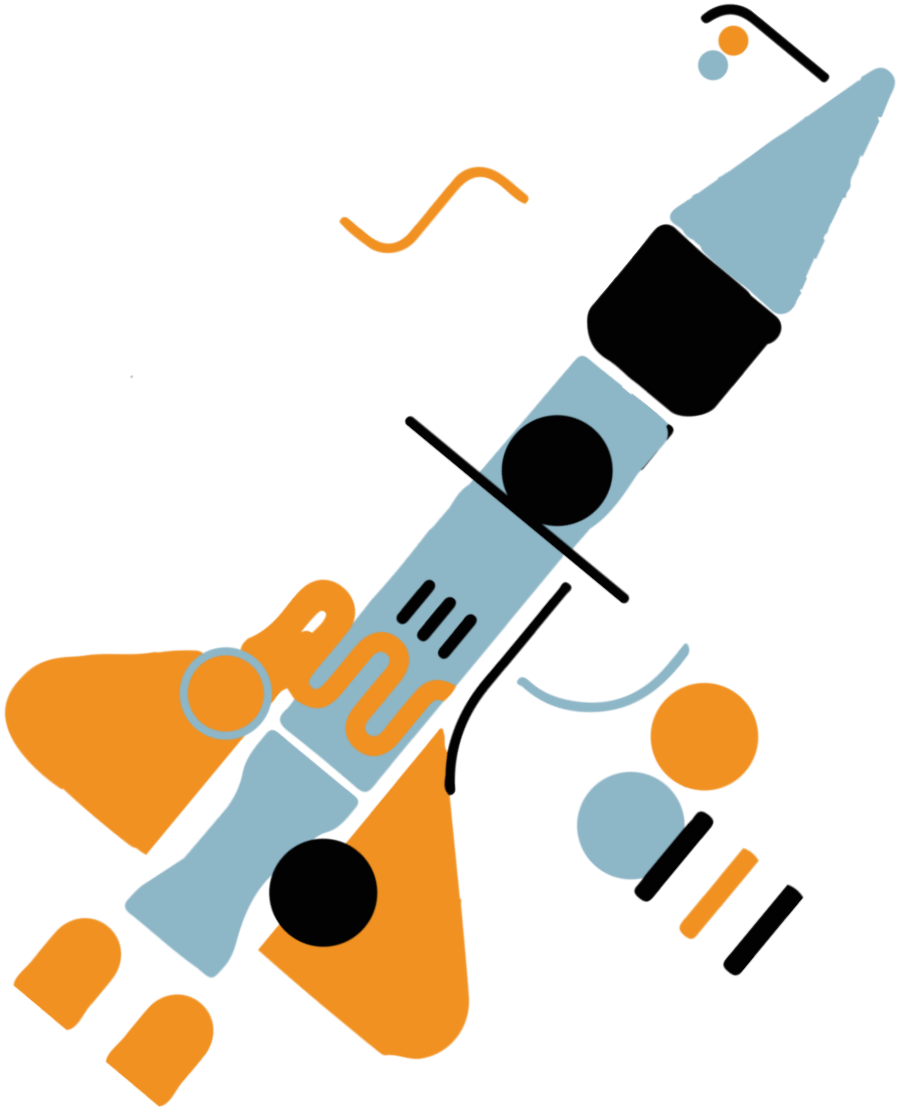

The true transformation is a journey not a destination

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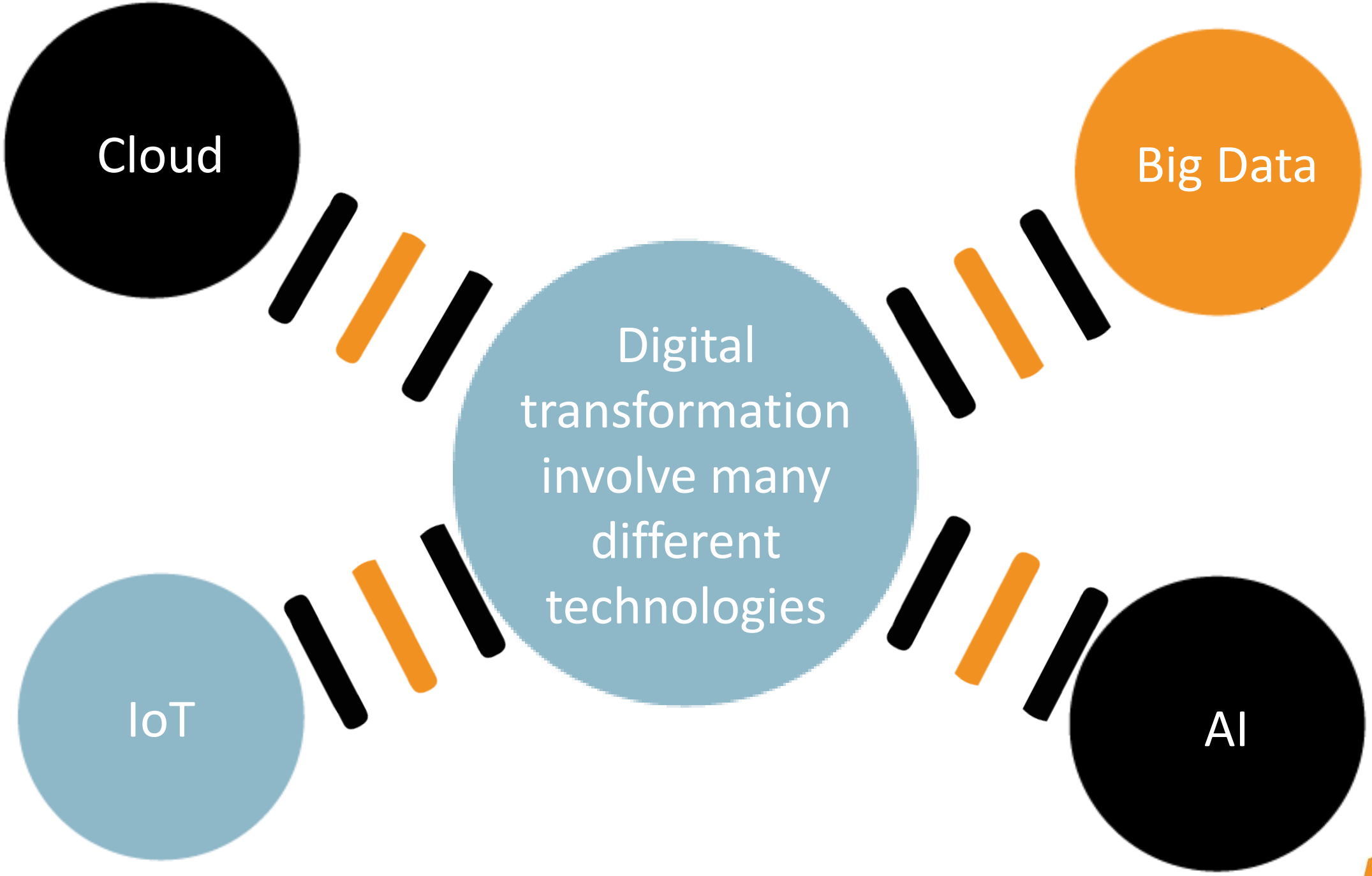

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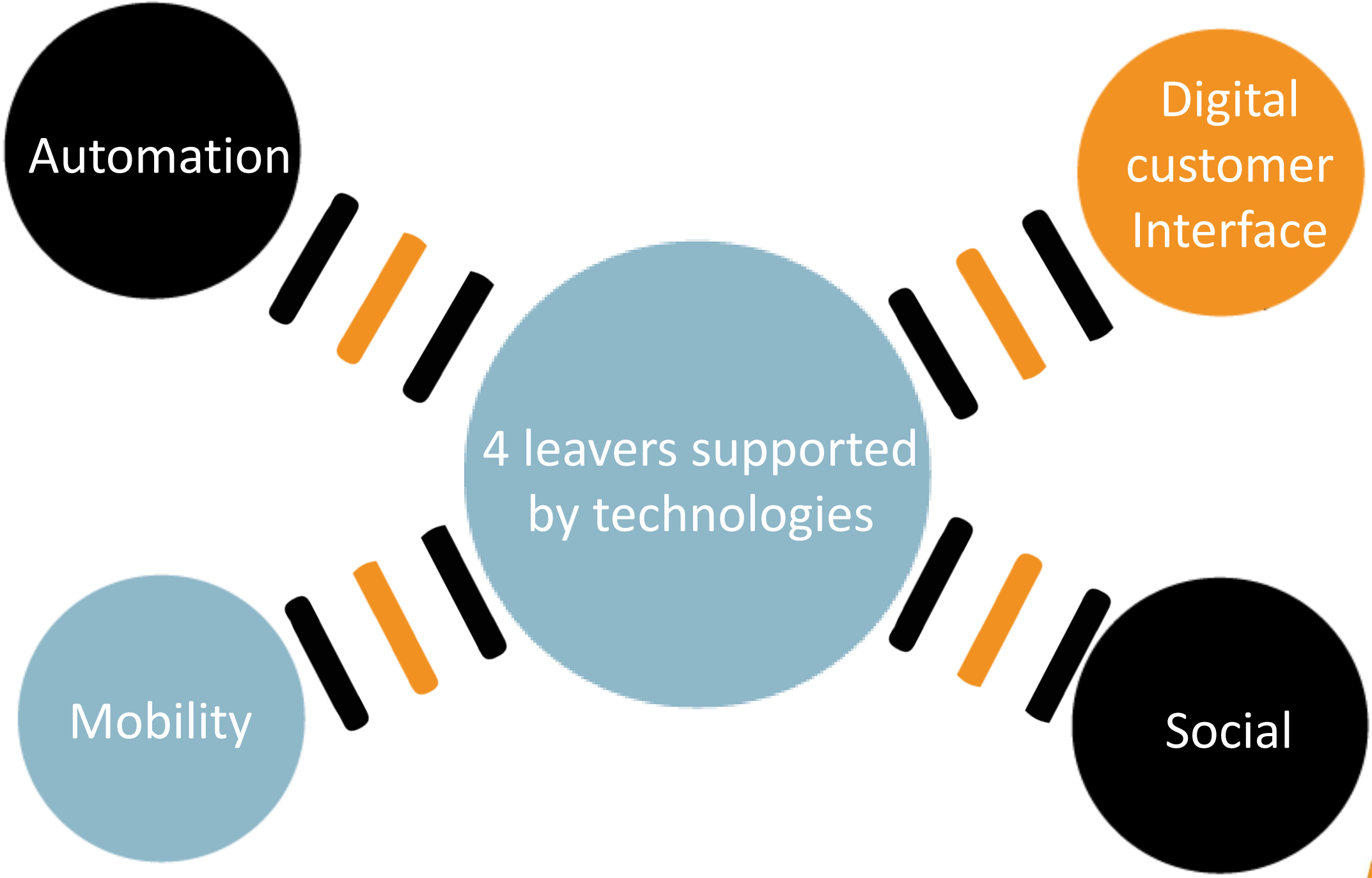

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Digital can have a significant positive impact through four levelers

- Stronger connectivity
- Greater efficiency and automation
- Better decision making
- More advanced innovation

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Japan’s Prime Minister, Shinzo Abe published in 2017 this commercial created by the Japanese government about the new advanced “Society 5.0”

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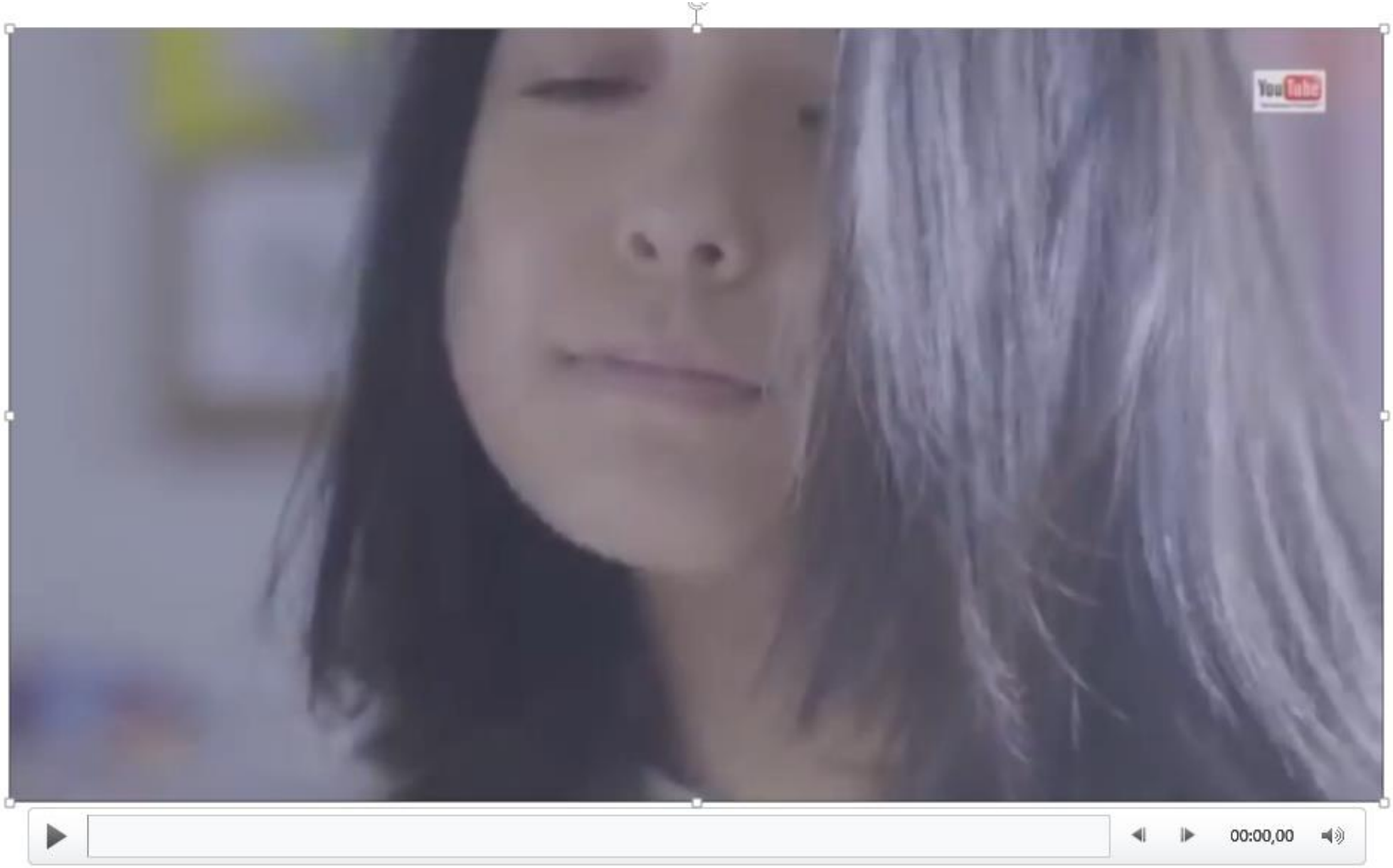
Project Society 5.0 in Japan



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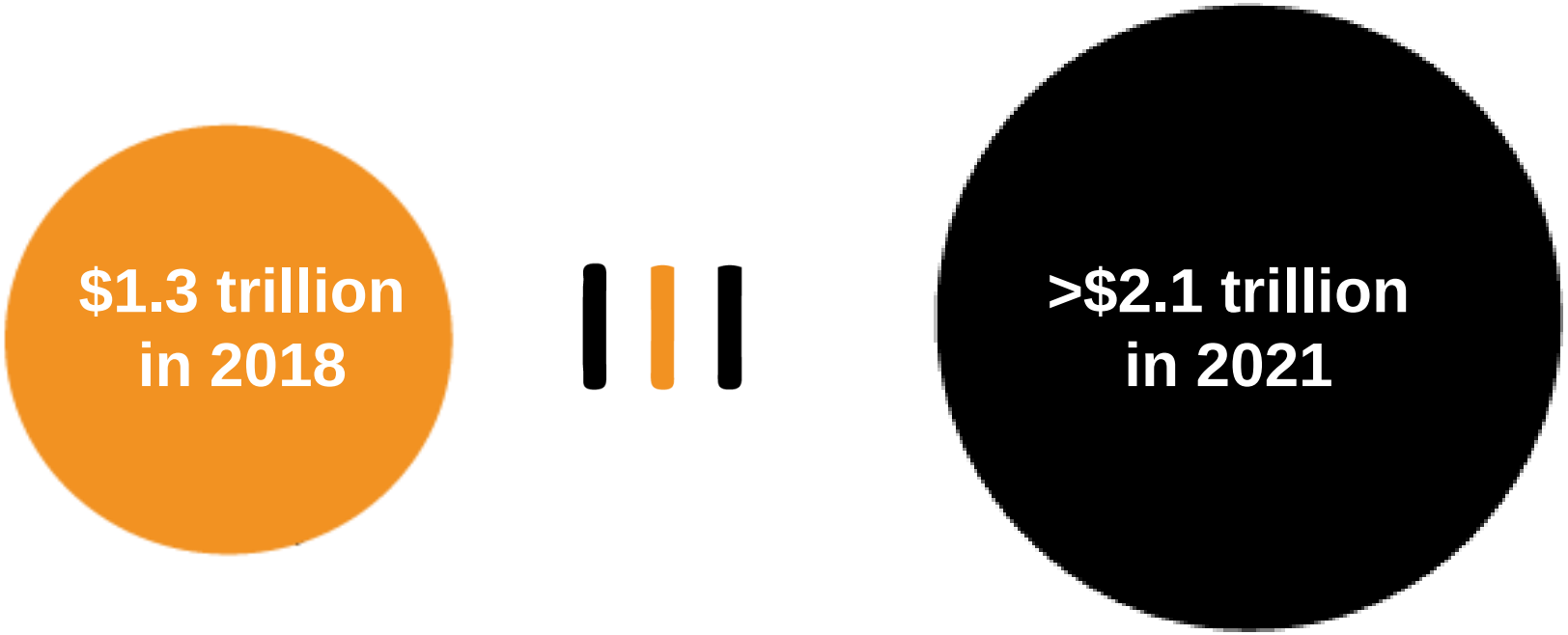
Worldwide spending on digital transformation technologies (hardware, software, and services)



Source: IDC: IDC Forecasts Worldwide Spending on Digital Transformation Technologies to Reach $1.3 Trillion in 2018 Dec. 15, 2017
https://www.idc.com/getdoc.jsp?containerId=prUS43381817

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Digital transformation and the key role of data and information

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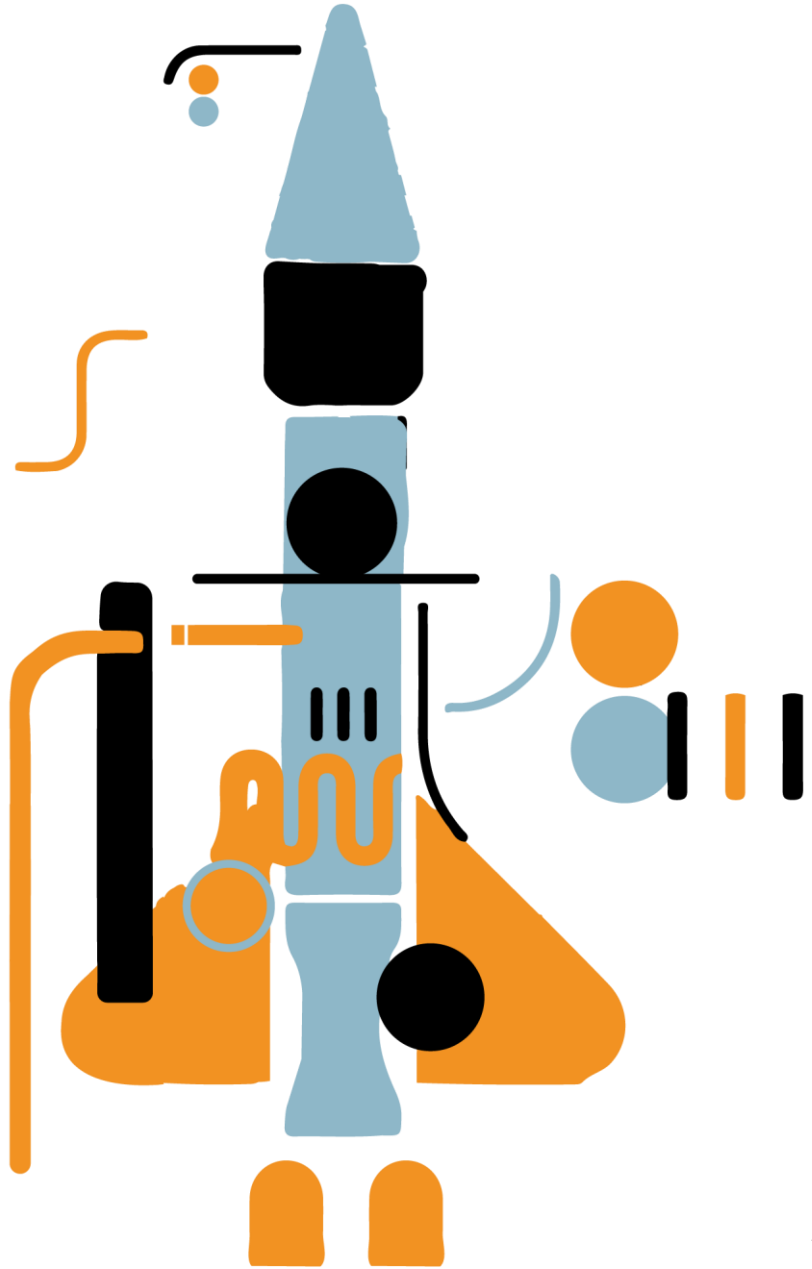

- Information management is **essential** to digital transformation

- 4 information chaos challenges
  - 1. How do we optimize business processes?
  - 2. How do we get any business insight out of all the information we collect?
  - 3. How do we use information to better engage customers, employees and partners
  - 4. How do we manage the risk of growing volumes and complexity of content?

- Information management **turn** these 'information chaos' **problems** into **solutions**

According to John Mancini of AIIM (Association of Information management Professionals)

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Businesses in every industry need to apply a digital transformation not only to stay competitive, but to survive

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Digital Transformation
A major opportunity for healthcare

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The healthcare industry is experiencing rapid change resulting from evolving consumer and employer demands and regulatory requirements, as well as the rapid evolution in technologies

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The healthcare industry is experiencing **rapid change** resulting from **evolving consumer** and **employer demands** and regulatory requirements, as well as the rapid **evolution in technologies**

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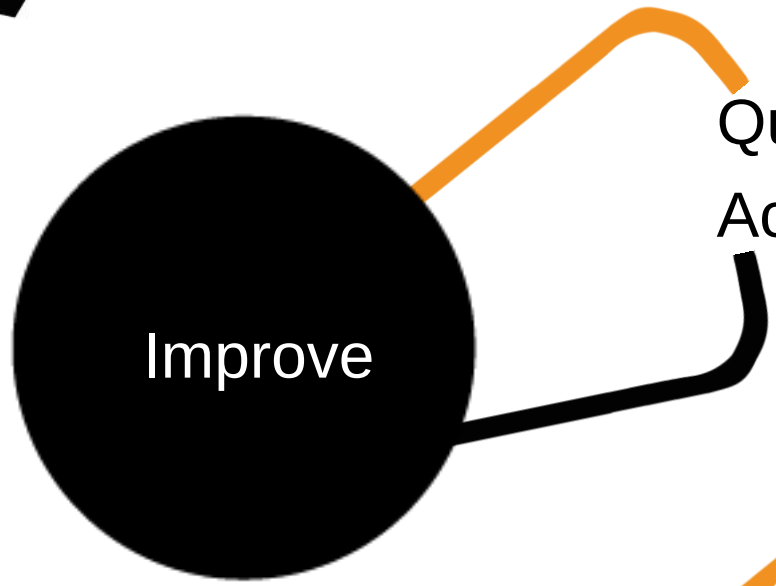
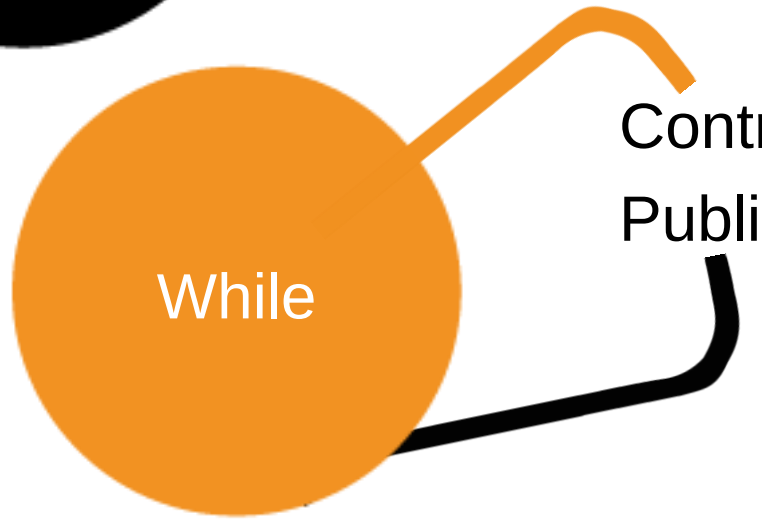
Challenge of making healthcare better across the globe



Quality of healthcare

Access to healthcare



Controlling cost as populations age and grow

Public expenditure on healthcare is under pressure

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The aging population

America's 65 and over is projected to nearly double over the three decades

National Institute on Aging

Percentage of the population over 65 years old

26.3 Japan

22.4 Italy

21.2 Germany

With aging population also comes less people are 'active' and are able to contribute to healthcare systems funding and increase of chronic diseases

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Chronic diseases already account for three quarters of deaths across the globe

Only 5 of these diseases will cost the economy 47 trillion USD by 2030

Source: World Economic Forum – The Global Economic Burden of Non-communicable Diseases
http://www3.weforum.org/docs/WEF_Harvard_HE_GlobalEconomicBurdenNonCommunicableDiseases_2011.pdf

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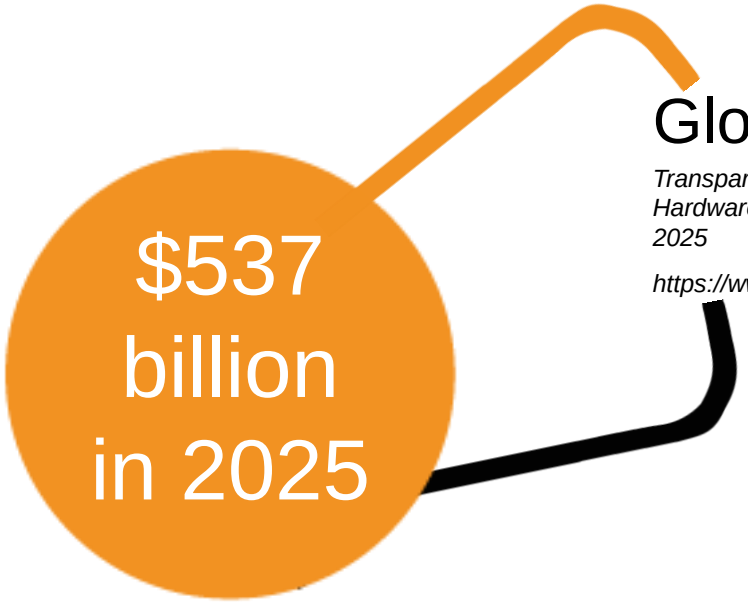

Global Digital Health market Revenue

Transparency market research: Digital Health Market (Product - Health Care Information Systems and Wearable Devices; Component - Hardware, Software, and Services; End User - B2C and B2B) - Global Industry Analysis, Size, Share, Growth, Trends and Forecast, 2017 - 2025

https://www.transparencymarketresearch.com/digital-health-market.html

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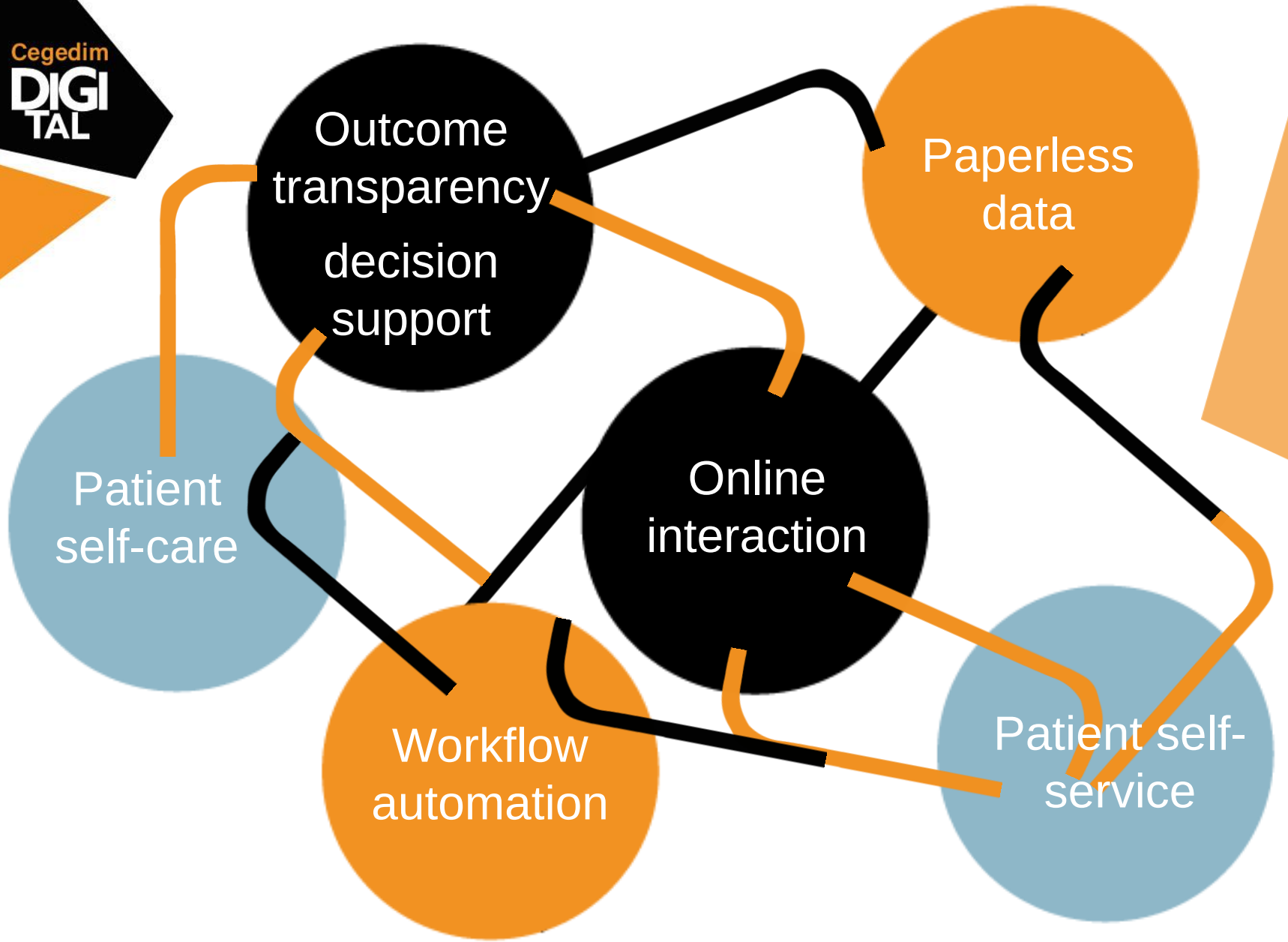
6 areas of improvement through digital transformation



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Digital solutions helps

Cut Costs

Alleviate problems

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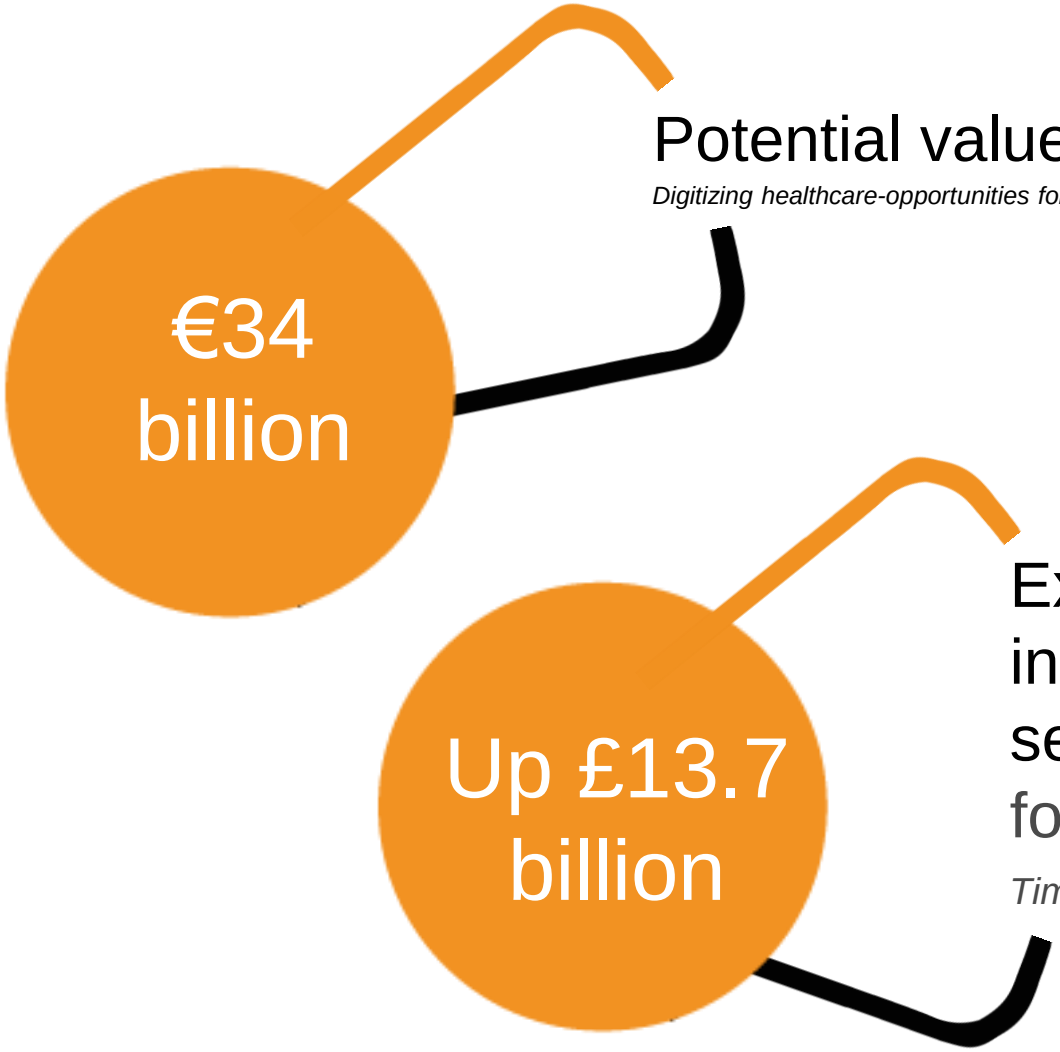
Example of expected savings due to digital transformation



Potential value of digitizing healthcare in Germany

Digitizing healthcare-opportunities for Germany. Digital McKinsey October 2018

Expected savings by NHS from investment in electronic health records, digital services, and data out of a £127 billion forecasted healthcare budget by 2020–21

Tim Kelsey, NHS England's director of patients and information

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Simplify complexity

Eliminating complexity, offering clear information and automating parts of the routine tasks, freed up resources

Growth patient engagement and responsibility

Healthcare systems will increasingly take into account lifestyle and behavior

- Live healthy and get rewarded
- Live unhealthy and don’t get awarded

Security and patient data challenges

Data is intensively used and transformational for the healthcare industry. Consequence: Security is a key priority

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Why digital is now crucial for private health insurers in Europe?

A digital transformation can enable Private Health Insurers (PHI) in Europe to:

- Control costs
- Attract new customers and retain existing ones
- Influence the quality and quantity of delivered care
- Transform how they interact with customers
- Transform how they manage their organizations

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Cegedim a partner of choice for the digital transformation of the healthcare sector

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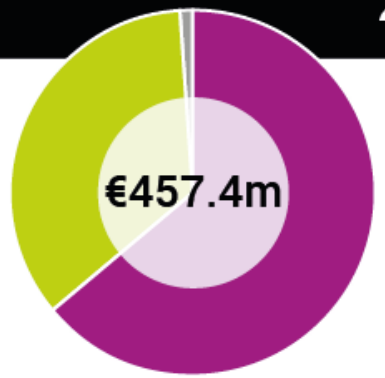
Cegedim at Glance FY 2017

FRANCE-BASED COMPANY ESTABLISHED IN 1969

Cegedim is an **innovative technology and services** company in the field of **digital data flow management** **for healthcare ecosystems** and B2B, and a **business software publisher** **for healthcare and insurance** profesionals.

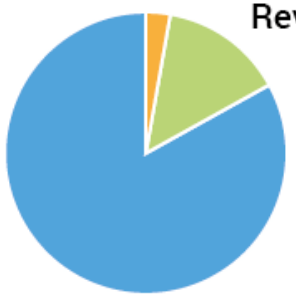
2 OPERATING DIVISIONS



- Health Insurance, HR & e-services 64%
- Healthcare Professionals 35%
- Corporate & Others 1%

A GLOBAL PRESENCE

Revenue breakdown by Geography



- America 3%
- EMEA (excl. France) 14%
- France 83%

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Cegedim Key Figures

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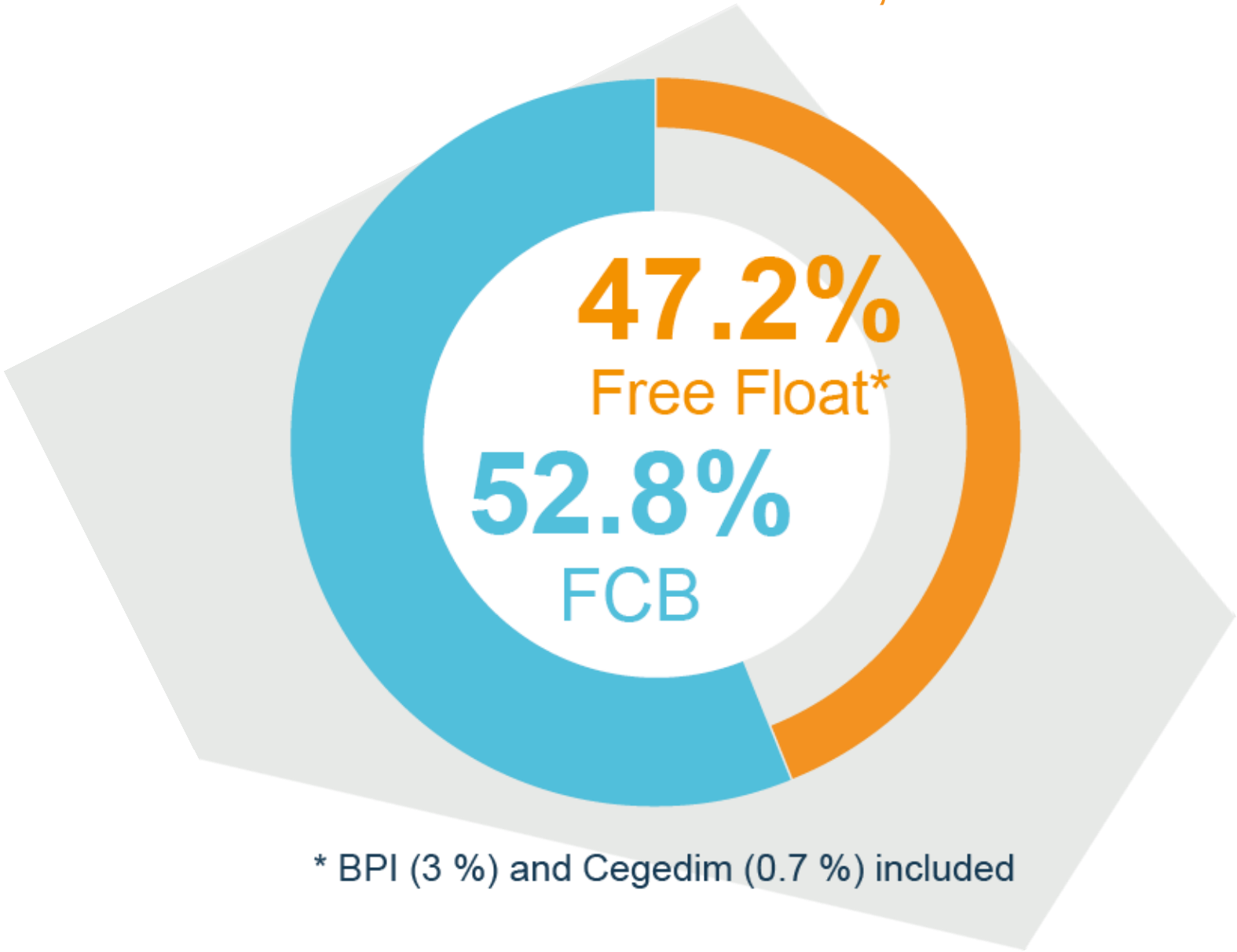
Shareholder Structure as of October 31, 2018



* BPI (3 %) and Cegedim (0.7 %) included

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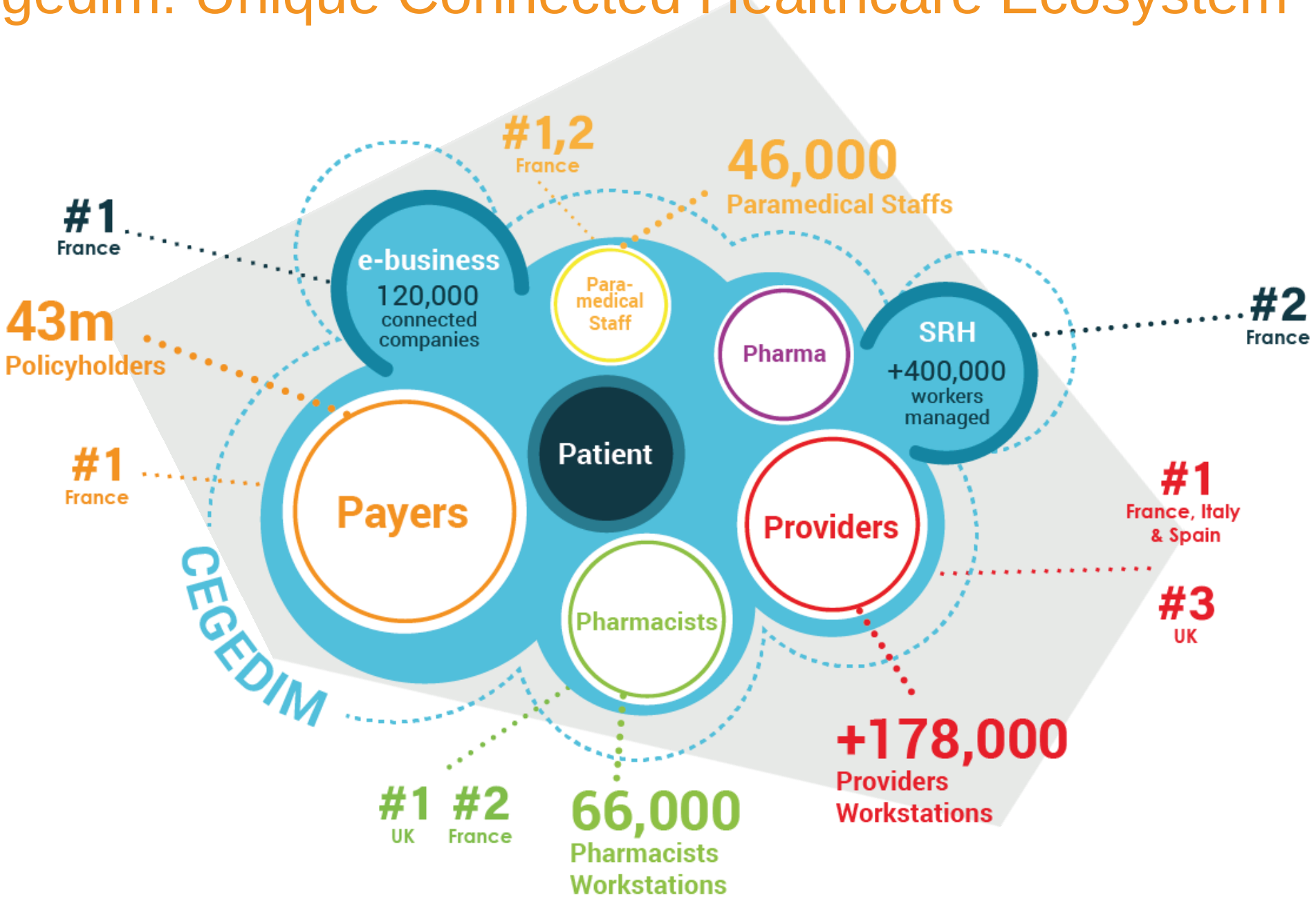
Cegedim: Unique Connected Healthcare Ecosystem



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Cegedim: Key Facts

An integrated player in the healthcare ecosystem, with leading positions on niche segments

A successful business model transformation

Strong R&D capacities supporting innovation efforts

Diversified clients in longstanding relationships

Long-standing majority shareholder

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Overview: Health Insurance, HR & e-services solutions

Product Division	Solutions	Key figures
Insurance Solutions	Software Digital Solutions for preventive healthcare BPO services Third-party payment management	· **43 million** persons managed · **3 billion** health benefits invoices managed / year
Digital and Data	+ E-promotion + Digital communication + Sales statistics for pharmaceutical & HABA products	· **Network of 8,000** pharmacies in France
HR Solutions	+ SaaS platform for HR management + HR BPO services	· **for all** industries · **+250** clients
e-business	+ SaaS platform for electronic data exchange including payment and process digitalization platforms	· **for all** industries · **2.9 billion** euros paid
Other services	Outsourced services	· **1** new BPO service center created in 2017

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Overview: Healthcare Professionals Solutions

Product Division	Solutions	Key figures
Pharmacy software	+ Integrated software for pharmacy + Web solutions for patients monitoring and medical benefit reimbursement	· **39%** market share in the UK · **650 millions** prescriptions managed / year in the UK with Cegedim Rx
Doctor software	+ Practice Management Software + Electronic patient record management, billing solution, Revenue Cycle Management SaaS/ mobile solutions	· **#1** France, Italy, Spain · **#3** United Kingdom · **10,000** healthcare practitioners network in the US
Paramedical software	+ Practice management software + Mobility integrated solutions	· **46,000** healthcare practitioners using RM Ingenierie Solutions in France in 2017
Medication database	+ Medication database + Development of apps and web portals providing access to the BCB database	· A database used by Healthcare Profesionals in **5 countries** · Approved database by the «Haute Autorité de Santé» since 2008

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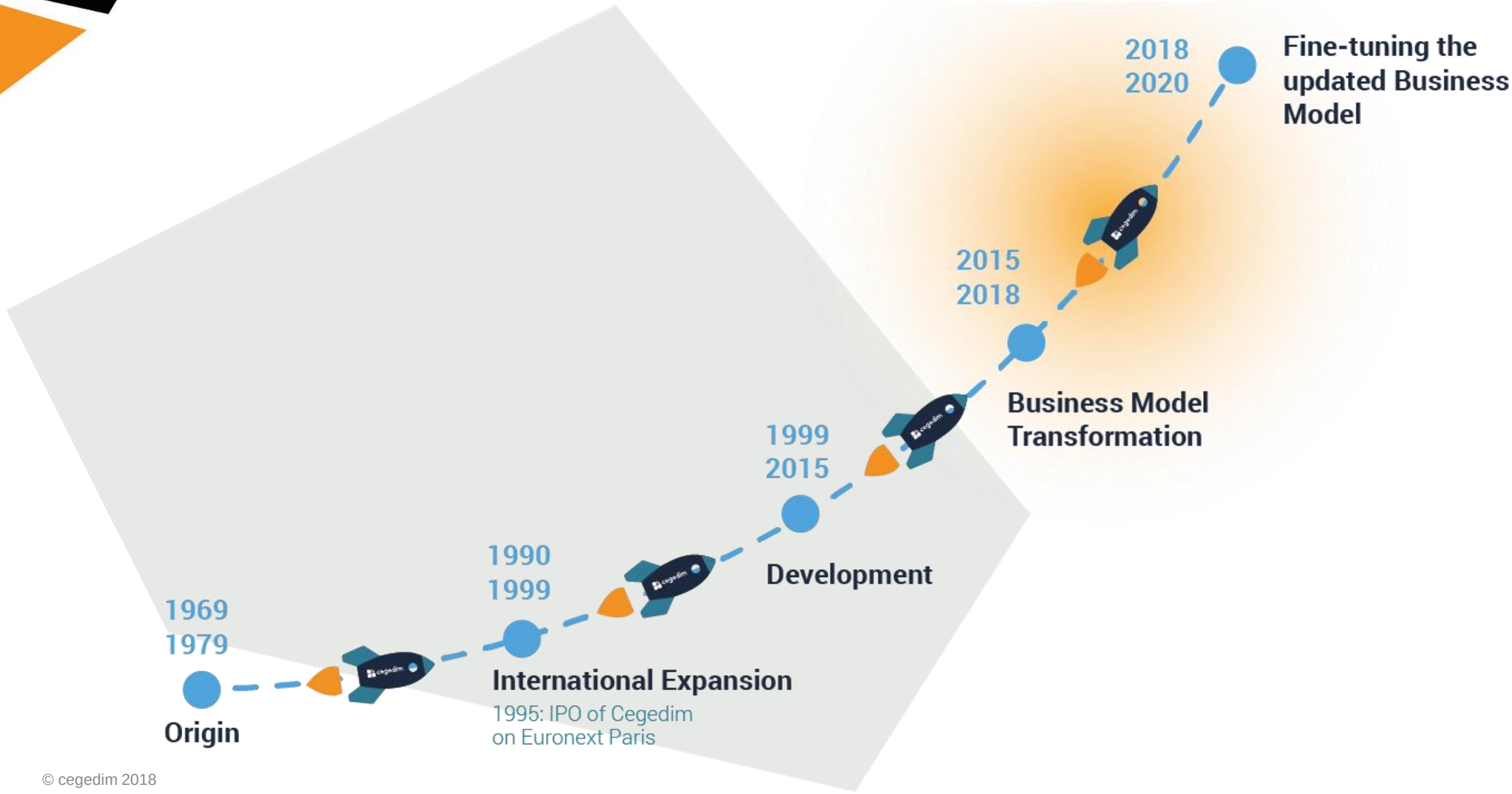
Chronology



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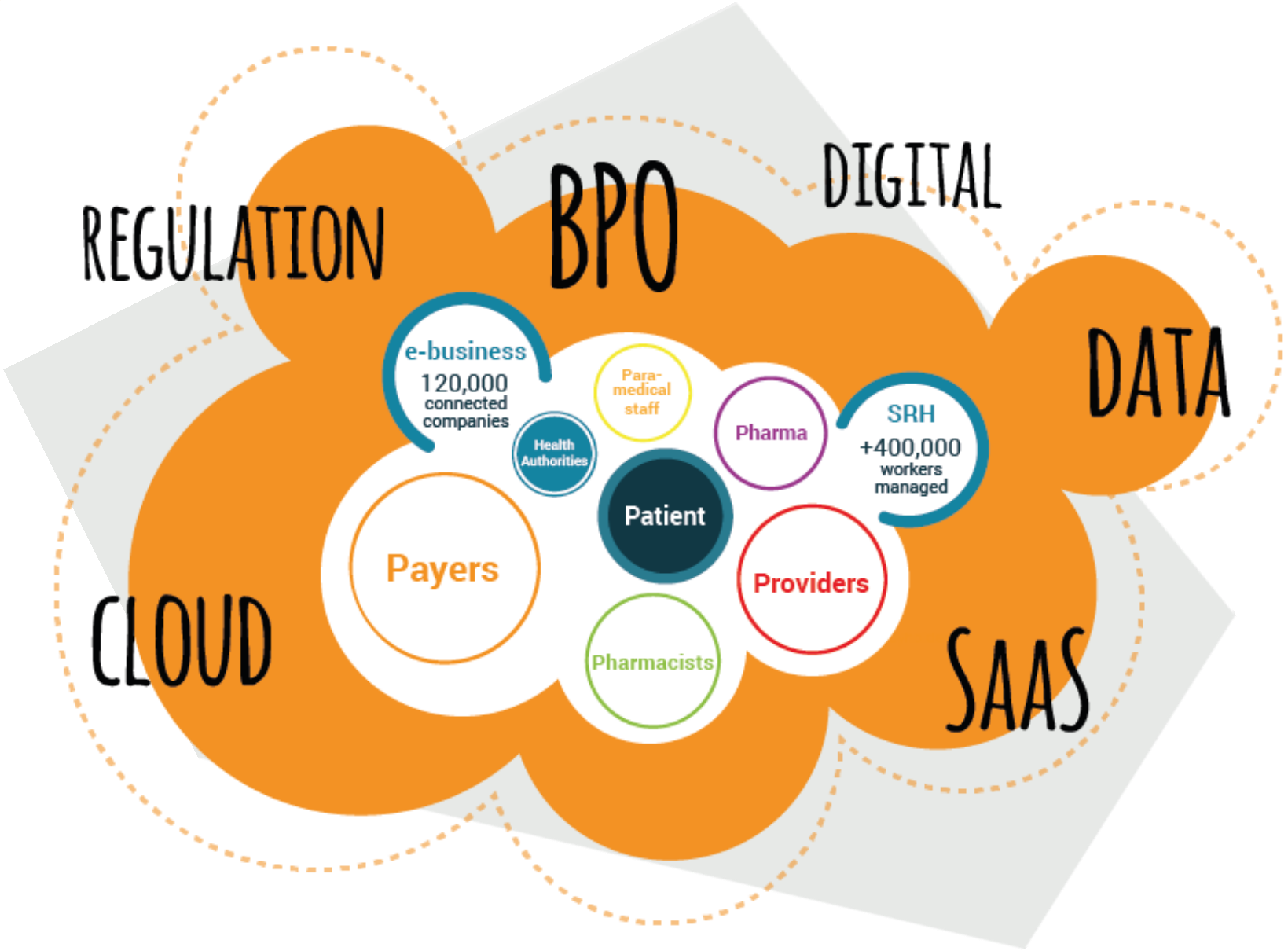
Many Drivers Ensure Profitable Growth



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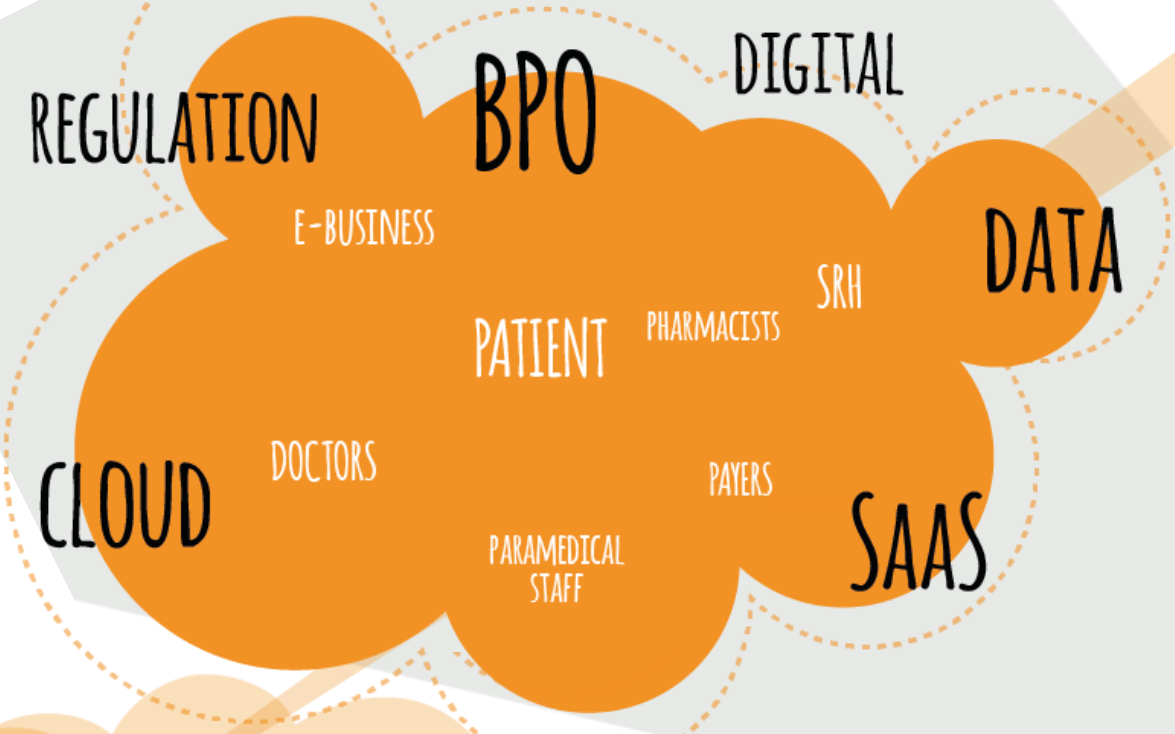
Many Drivers Ensure Profitable Growth



PROFITABLE GROWTH

Portfolio Management

Investing in Innovation

Business Model Transformation

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In practical terms, how is Cegedim revolutionizing the healthcare industry?

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01 **CHS**

Stefan Janssens

President Cegedim Healthcare Software

02 **US Healthcare Digital Transformation**

Kathy McClung

Practice Administration at OANO

03 **Telemedicine: Legal Framework and Docavenue**

Eric Jarrousse, VP Strategy CHS

Arnault Billy, General Manager

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04 **Gers Data**

Gilles Paubert, Global Head of Real World Data

David Syr, Managing Director Gers Data

05 **Cegedim.Cloud: Digital trust builder**

Frederic le Guillou, Chief Information Officer

06 **Digitalization of company processes in and outside healthcare segment**

Philippe Simon, CEO BU Cegedim Insurance

Pierre-Henri Comble, Head of Strategy BU Cegedim Insurance

07 **SY by Cegedim: Process Digitization in and outside healthcare segment**

Benoit Garibal, General Manager

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cegedim Healthcare Software

Success story

Stefan Janssens
President Cegedim Healthcare Software

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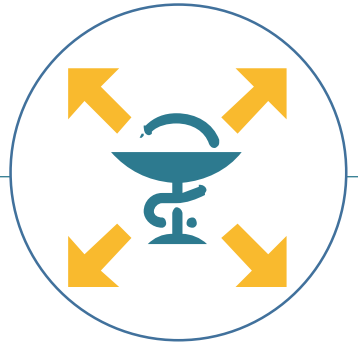
Few KPIs

178,000
providers



66,000
pharmacies

46,000
paramedics

- Activities in **11 countries**
- Only supplier that has an agreement with the 4 NHS bodies in the UK
- Cloud solutions across the board
- **28%** staff is in R&D
- All affiliates have certified solutions
- BCB in **5 countries**

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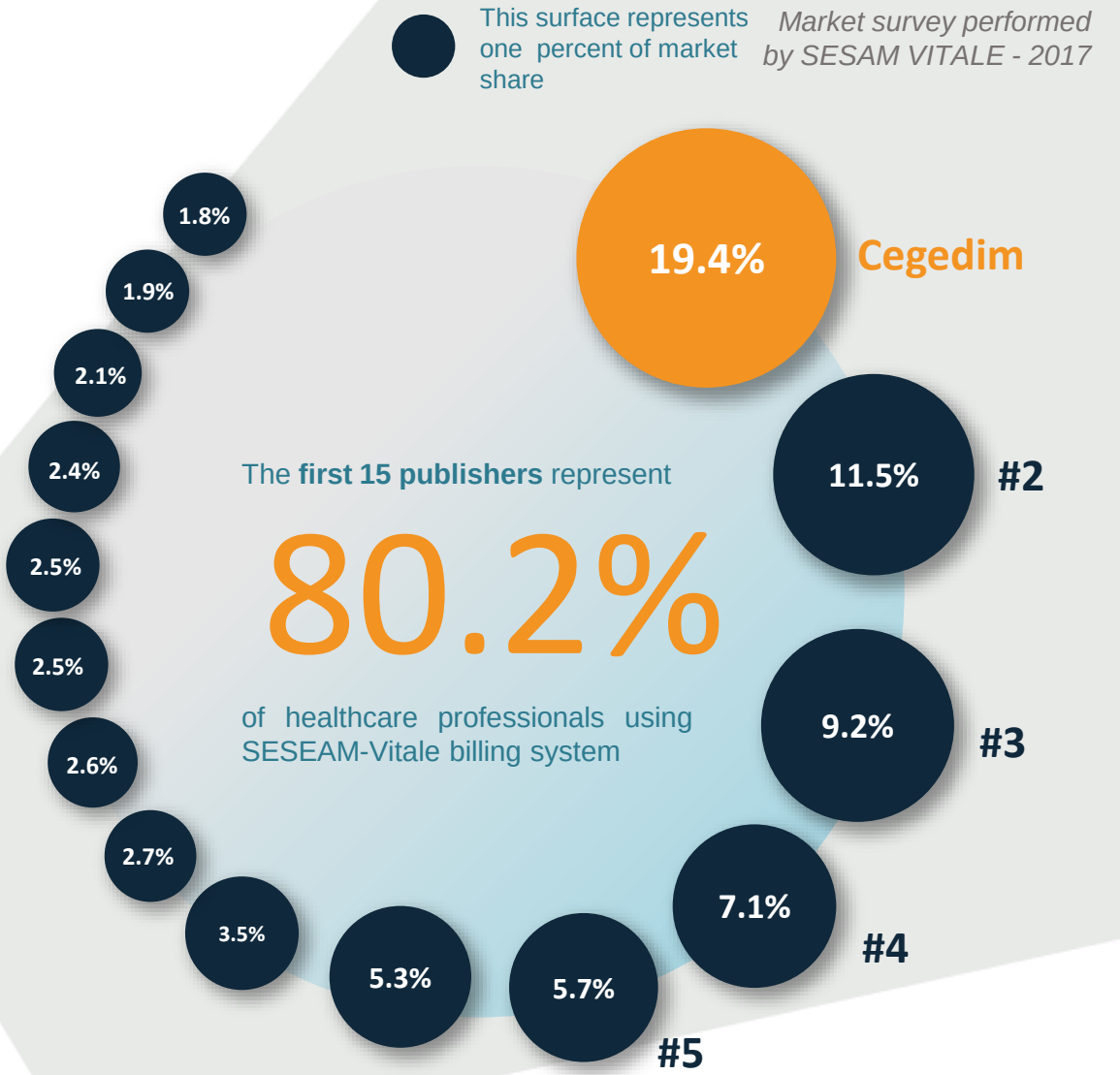
Cegedim Healthcare Software FRANCE

Cegedim is the market leader in number of healthcare professionals using SESAM-VITALE invoicing system.



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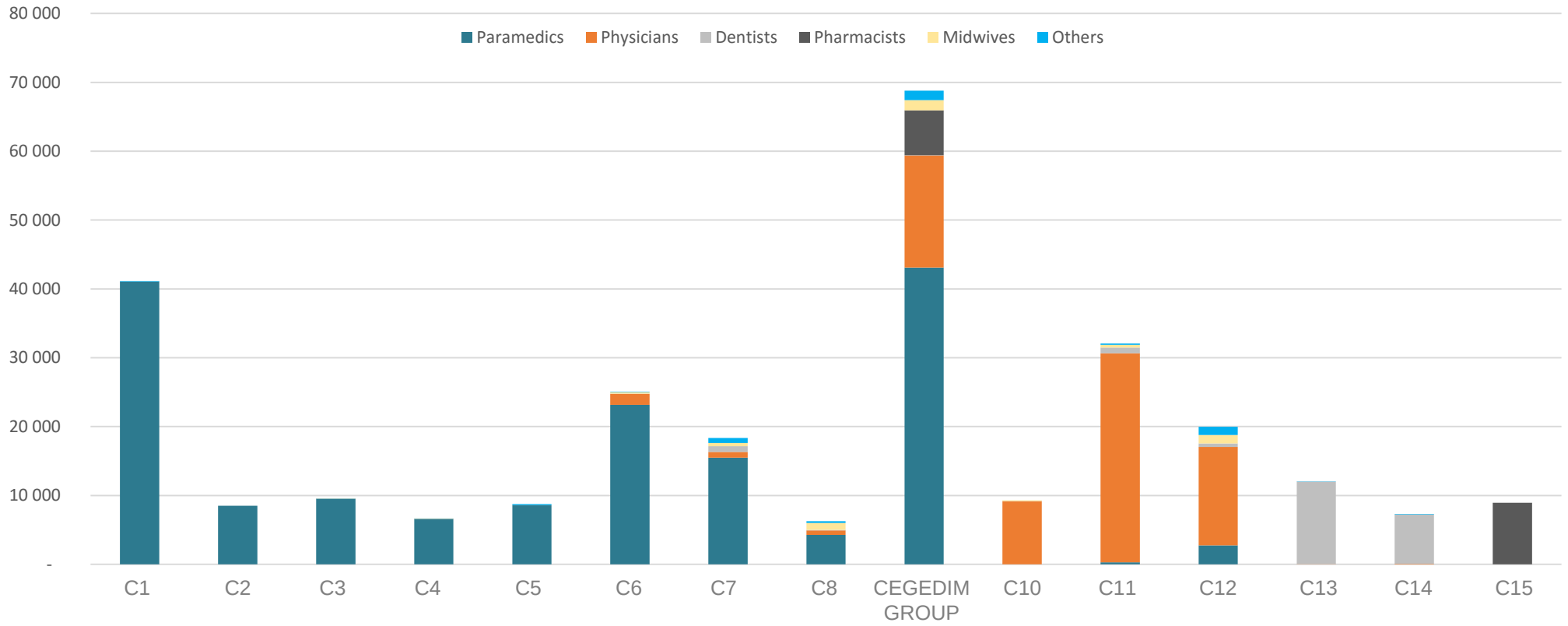
Cegedim Healthcare Software FRANCE

Unlike its main competitors in France, Cegedim is not specialized in only one category of health care professional software. Through its three entities CLM, SMART RX and RM INGENIEERING, CEGEDIM addresses the vast majority of healthcare professionals software.



Market survey performed by SESAM VITALE - 2017

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Organization

- The creation of the Software factory proves to be a success
- Increasing Nearshore/Offshore Teams and Quality
  - Romania
  - Morocco
  - India
- Ahead of our competitors with the creation of Docavenue (100 staff) and the launch of our teleconsultation solution
- CHS Organization responds to the rapidly changing Healthcare environment
  - Strategy to converge our solutions
  - Businesses in UK and Romania under the umbrella of 1 General Manager

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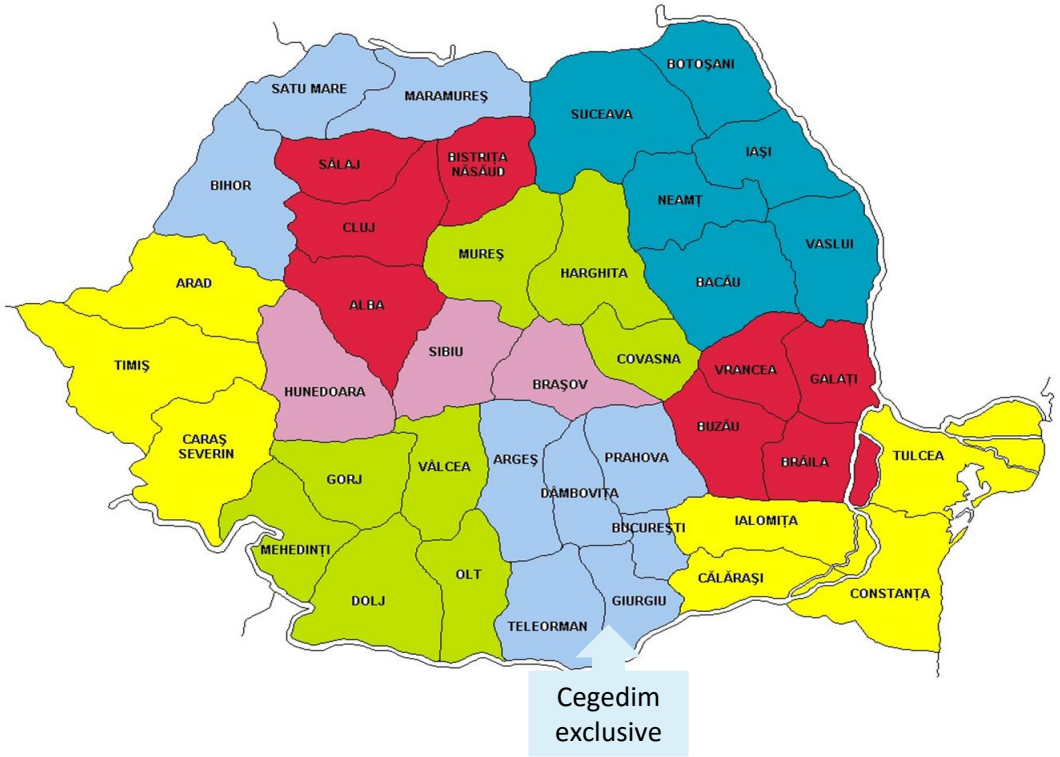
Organization

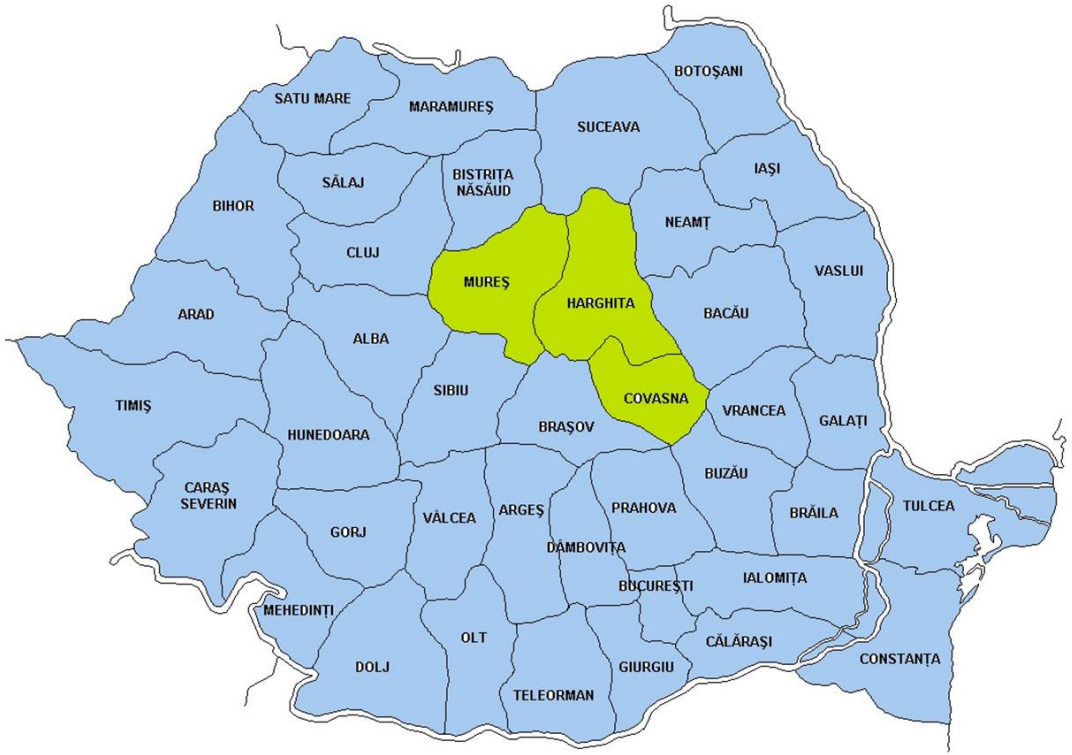
Romania

12 months ago

and **now**



Cegedim exclusive



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Digital Transformation

- CHS supports clients:
  - to provide better healthcare services
  - to be more efficient

- A few examples of both

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Better Healthcare Services:
CHS Solutions

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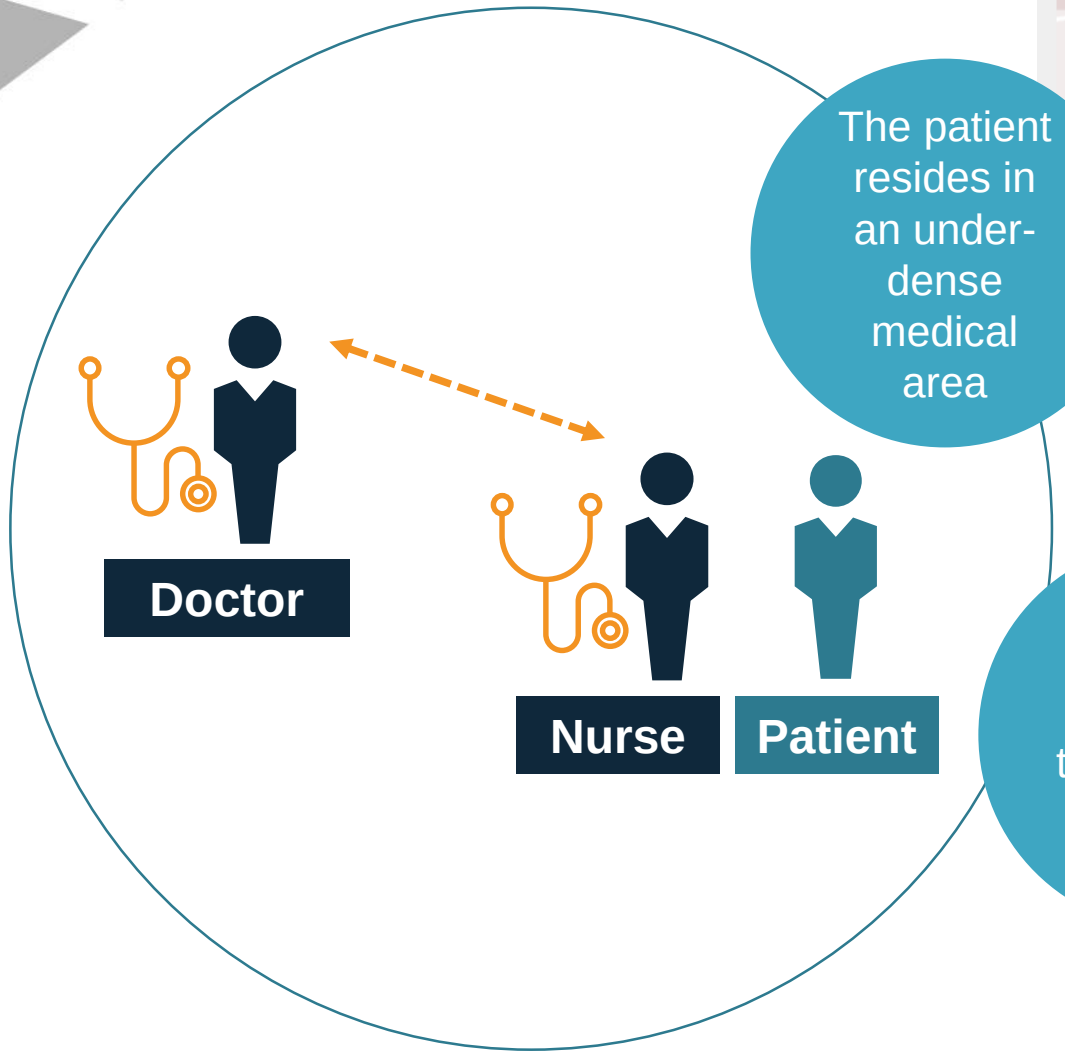
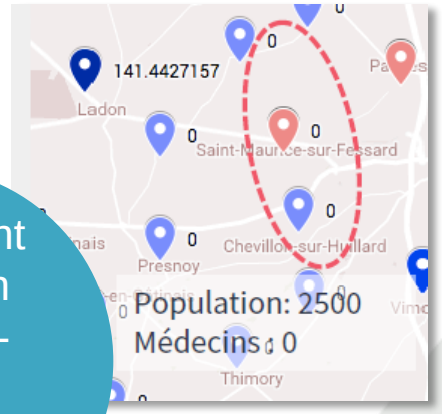
Assisted Teleconsultation France



The patient resides in an under-dense medical area



The patient is assisted by a nurse, the doctor is in a remote location

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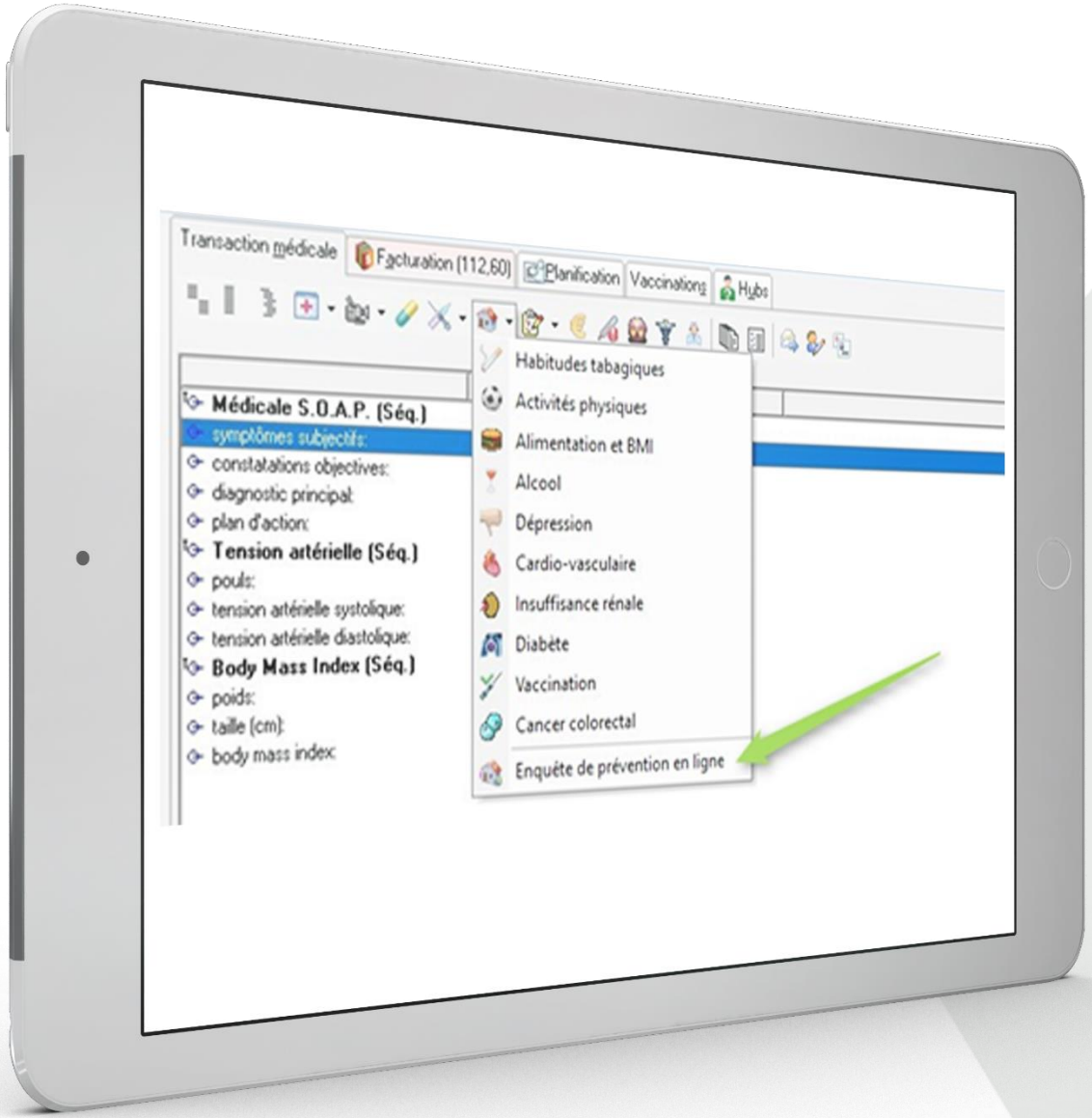
HDMP (Belgium)



- **Prevention Health Guide**, developed by the leading Doctor Organization (Domus Medica & SSMG)
- **Paper questionnaire** processed manually by the GP in his HER
- **Time consuming …. Result** = Poor Prevention
- HDMP created a **digital online version** of the questionnaire
- **Can be completed at home** or on a tablet in the waiting room of the practice
- **10 chapters** : smoking, diabetes, depression, alcohol, …
- Patient is invited by email to complete the questionnaire

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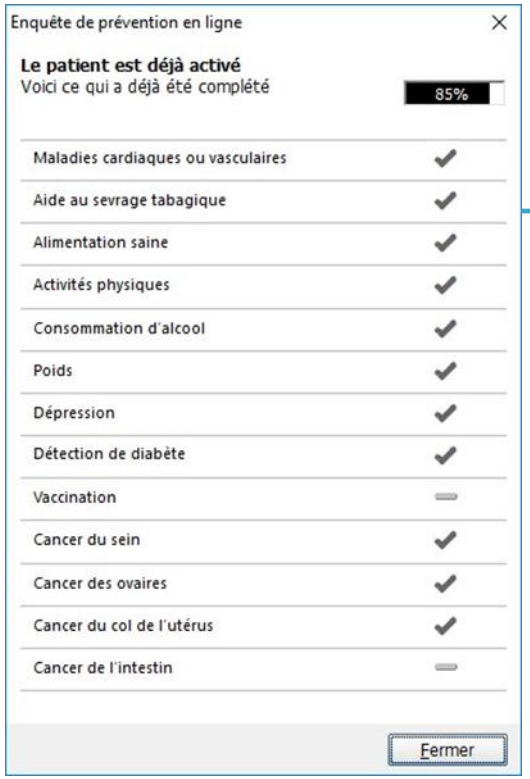
HDMP (Belgium)

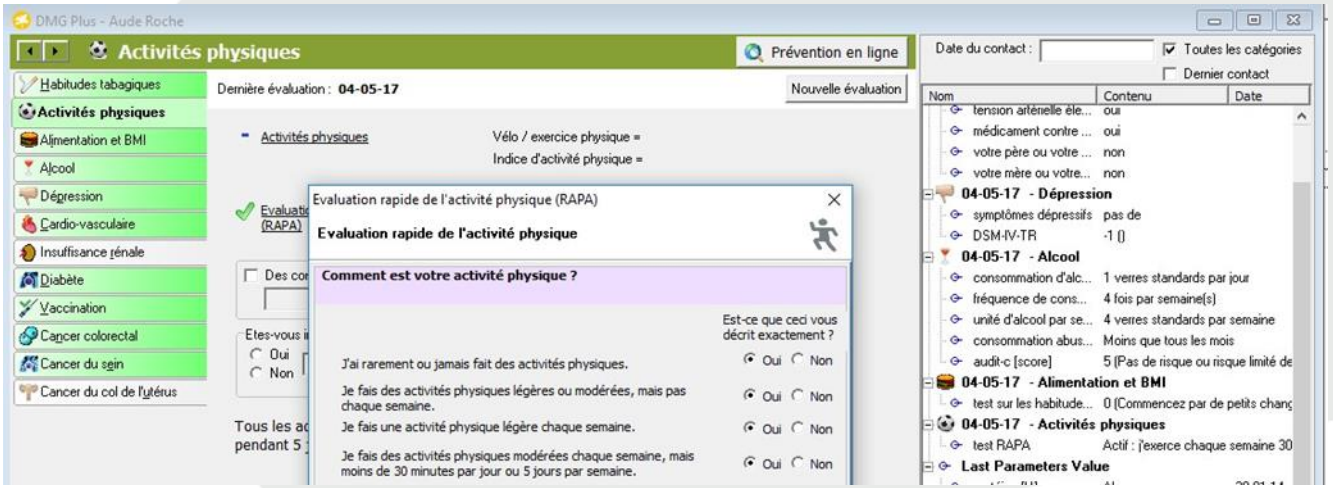


Prevention Module

- **GP can follow status, and gets alert** when completed.
- Answers will be integrated in the Prevention Module of the EHR

Depending on the Patient answers :

- More questions can be raised
- Guidelines are proposed to the GP



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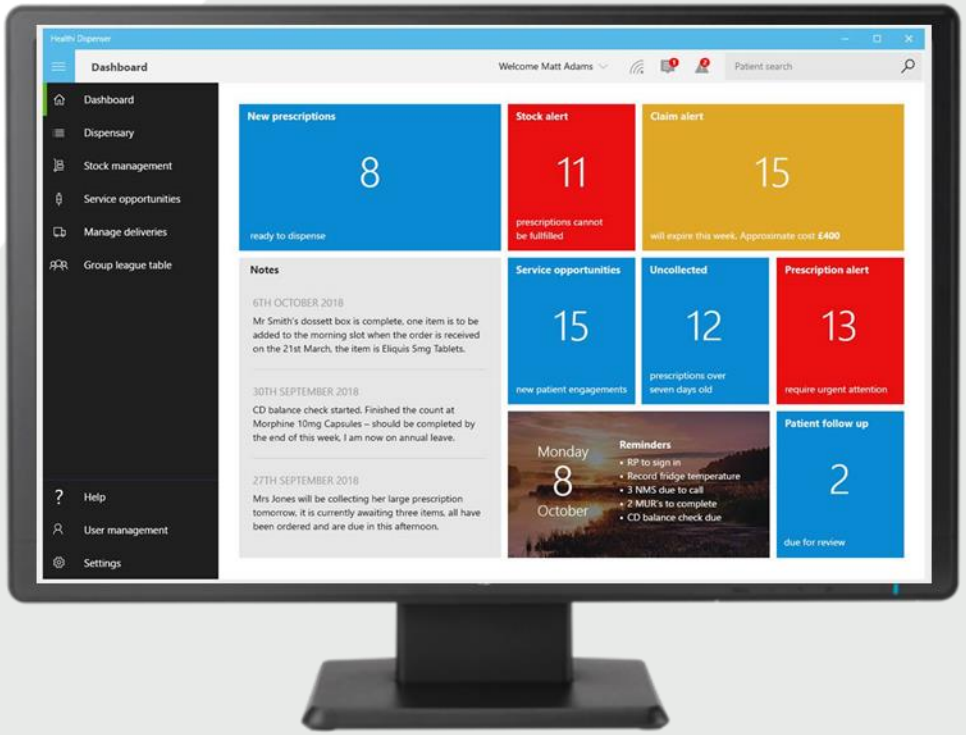
Cegedim RX UK

- **Healthi Dispenser** is Cegedim Rx's next generation dispensing platform

- Using Healthi Dispenser Pharmacists can:

  - **Have a centralized dashboard** that highlights the condition of the Pharmacy, so that any issues can be easily identified and addressed

  - **Use intuitive dispensing workflow** allowing pharmacists to dispense quicker allowing greater patient management



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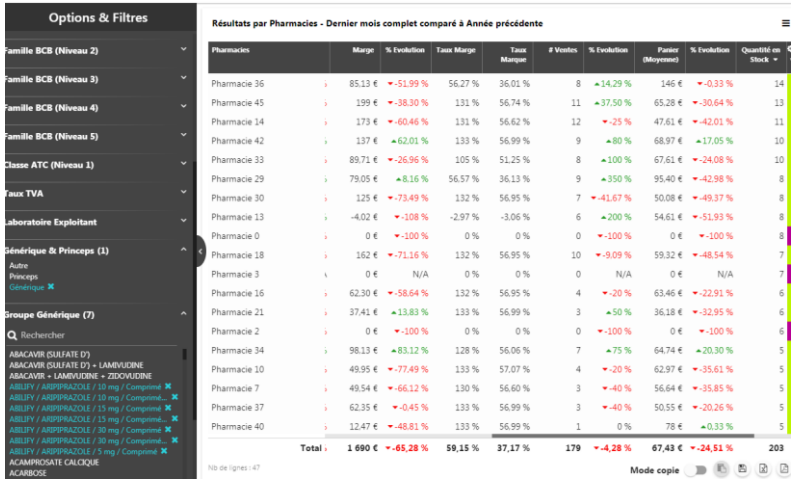
SmartRX 360 Pharma Groups Strategy



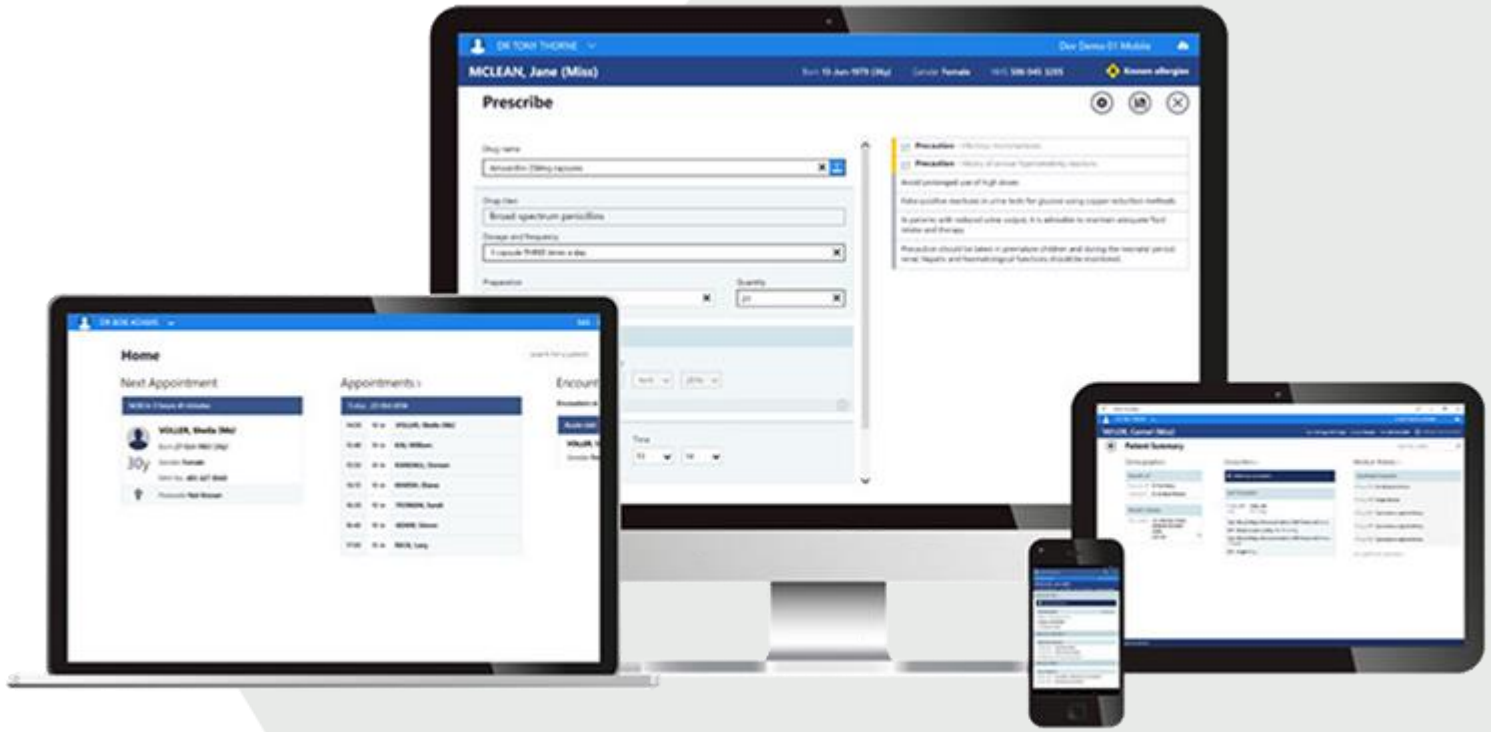
For the Pharma Groups:

- Real-time monitoring tool to support commercial strategy proposed by Pharma groups to their members
- Follow up of contracts / market
- Promotion tracking tool
- Margin follow up by range of product
- Competitors analysis

© Cegedim 2018

Vision Anywhere (UK)

- **Anytime, anywhere** access to patient records by desktop, iPhone, iPad, AndroidTM phones and tablets.
- The NHS Highland pharmacy team now uses Vision Anywhere during remote medication reviews to :
- Conduct the reviews from any location.
- Have sight of medical records
- Add details of interventions.
- Save on the need to travel to each GP practice to see their patients



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Simply Vitale

- RMI : Twintab for Simply Vitale
- 2 card readers : CPS (healthcare professional) + Vitale card
- TwinTab 2 integrates a 4G card to allow access to the Cegedim telemedicine APIs from the patient's home

© Cegedim 2018

Improved efficiency

How to bring more service to our customers?

- Backup time is a wasted time
- The absence of recent backup in case of problems on the computer may have significant consequences (lack of medical data, missing billing elements, non-registered patients, ...)

Characteristics

- Daily backup in the background
- Cegedim Health Data Hosting
- History of 5 backups
- Monitoring & alerts
- User gain: 15min / day

médisauv
LA SOLUTION DE
SAUVEGARDE EN LIGNE

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Cegedim DIGITAL

US Healthcare Digital Transformation

Kathy McClung
Practice Administration at OANO

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Introduction

Kathy McClung

- New Orleans, Louisiana
- 40+ years in Healthcare field
- Started in 1973 as a receptionist in a Dermatology practice
- Currently is Administrator for Orthopaedic Group of 5 Orthopaedic Surgeons who execute 125 surgeries/month

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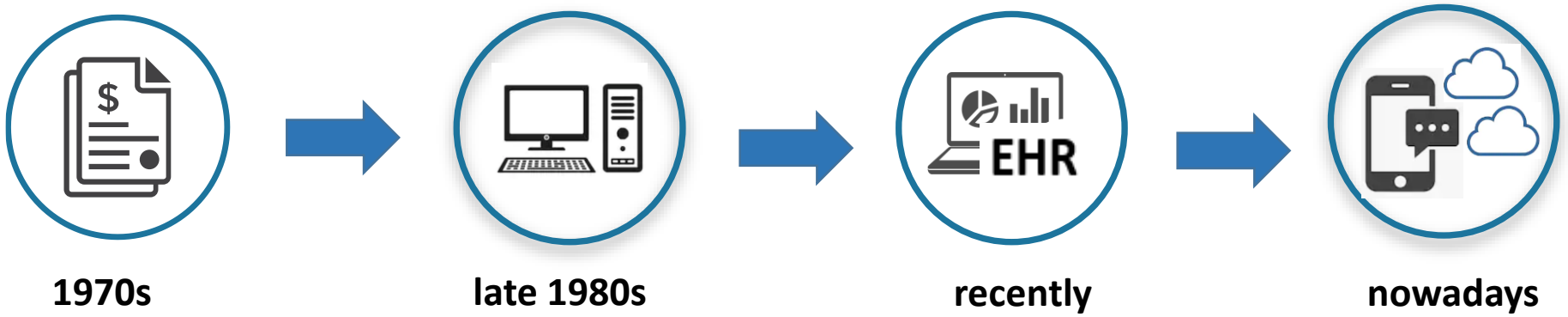
Evolution of Medical Billing & Technology



Patients want the convenience of contacting a doctor's office.

(e.g. They text pictures of injuries and post of surgery incisions.)

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Trends

- Demand for Cloud solutions reducing Total Costs of Ownership and business continuity
- Interoperability enabling physicians to manage end-to-end customer care
- Digital channels improving patient engagement
- Usability improving system utilization
- RCM robust reporting tools increasing business transparency
- Telemedicine improving patient access to medical service

© Cegedim 2018

Reasons for Cloud Technology

- Security
- Compliance
- Mobility
- High Availability & Redundancy
- Ease of management
- Hardware Agnostic
- Disaster Readiness
- No Server Maintenance, or Servers at all!
- Minimal Intervention

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US Healthcare Landscape

- Regulations:
  - MACRA: Merit-based Incentive Payment System (MIPS) and Alternative Payment Models (APM)
  - HIPAA: Health Insurance Portability and Accountability Act on processing of Personally Identifiable Information

- Growing Costs of Healthcare Service Delivery:
  - High-deductible health plans
  - Patient responsibility and Co-pay
  - Co-building risk-based premiums

- Market Consolidation:
  - Consolidation of practices with each other
  - Merges with hospital systems

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US Physician Practice Challenges

© Cegedim 2018

OANO Experience

- In 2017 Orthopaedic Associates merged with four other Orthopaedic groups in New Orleans.
- Major reason was to avoid acquisition by a hospital entity.
- The merger was Louisiana Medical Group, LLC (LMG).
- Pulse was engaged with LMG and did a great job.
- Orthopaedic Associates ended participation with group after 8 months, due to lack of transparency…
- Stayed with Pulse to avoid impact on productivity and revenue.

© Cegedim 2018

OANO and Pulse Partnership

- Cooperation started in 2013.
- OANO is a Revenue Cycle Management and Technology customer.
- Started using Pulse Cloud in 2018 that *reduced total costs, increased user enablement and ensured business continuity.*
- Very user friendly…*training time for new or current employees has decreased tremendously*.
- Developed very special relationship

© Cegedim 2018

Benefits of Digital Transformation

© Cegedim 2018

Cegedim DIGITAL

Legal framework and opportunities

in the remote consultation market in France and abroad in 2019

Eric Jarrousse
Vice President CHS in charge of Strategy

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Cegedim DIGITAL

01 Remote consultation: legal framework

02 Opportunities in remote consultation

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Remote consultation:
legal framework

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The legal framework for remote consultation

- Around a decade ago, most countries decided **to allow healthcare professionals to treat their patients remotely.**

- In some countries, such as **France and Portugal, national law defines both the legal framework and eligible procedures**. In others, such as the US and Canada, regulation is handled by professional bodies and/or may differ from state to state.

- Most countries without a national legal framework have issued non-binding standards or guidelines.

- Lastly, national healthcare models, i.e. predominantly public (Denmark) or private (US and Canada), affect the legal framework and development opportunities for RC. In the US, for example, 50% of companies offer their employees telemedicine services.

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The legal framework for remote consultation

Every country is trying to limit potential risks related to:

- **Verifying patient and practitioner ID**, practitioner qualifications, and patient consent;
- **Procedures for referrals** to/from the remote doctor and interaction with other doctors, for example the patient's treating physician;
- **Personal information and medical record** confidentiality and security;
- **TIC equipment reliability**, including network reliability and image quality;
- **Incorrect diagnosis or treatment**, for example due to the lack of a physical exam or poor image quality;
- **Writing prescriptions** remotely without an appropriate exam or access to a patient's medical history.

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The legal framework for remote consultation

In France: remote consultations (and four other telemedicine procedures) were first authorized in 2010 but were not yet reimbursed, apart from ETAPES projects. As of September 15, 2018, "Remote consultations for all" became a part of ordinary law, provided the consultation follows the prescribed Course of Care.

- Patients must have visited their treating physician (TP) in person within the past 12 months.

- If the patient has no TP or if the patient's condition requires them to see a doctor before the TP is available, they may conduct a RC with another doctor in the health system's Territorial Organization, such as at a multidisciplinary health facility (MSP) or a regional professional healthcare community (CPTS).

- Exceptions include patients under age 16 and specialists that may be seen directly (gynecologist, dermatologist, psychiatrist, etc.).

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Opportunities
in remote consultation

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Opportunities in remote consultation

- More than 3 million patients in less populated areas no longer have access to care, and 25% have stopped going to the doctor.

- Shortages in the medical profession will get worse over the next decade: the workforce has shrunk by 9% since 2007, and in 12 departments the decline is greater than 20%.

- The way healthcare professionals are being organized is paving the way for remote consultations because certain procedures can be delegated. The first Advanced Nurse Practitioners will be certified in 2020, along with 4,000 Medical Assistants, which will bolster this trend.

- The government's MaSanté 2022 plan calls for 1,000 regional professional healthcare communities (CPTS) nationwide by 2022. The CPTS will be the second option for coordinating remote consultations, after the treating physician.

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Opportunities in remote consultation

- Of the 18 million annual emergency room visits in France, 80% are for a simple problem that could be handled by a PCP.

- In an opinion requested by the Minister of Health, France's National Authority for Health said that no clinical procedure should be outside the bounds of remote consultation. Rather, eligibility requirements should be decided case by case.

- In the immediate term, the potential market for remote medical consultations is estimated to be around 24 million procedures annually.

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docavenue

Teleconsultation in motion

Arnault Billy
General Manager

© Cegedim 2018

Cegedim DIGITAL

01 What's our ambition

02 What's timeless in daily medical practice management for HCPs?

03 What's evolving, at last !

04 Docavenue Teleconsultation … in motion

© Cegedim 2018

2019& more: Strategy & Ambition

Our mission / Why do we do Docavenue ?

Help HCPs focusing on their Patients care

How do you do Docavenue ?

Making HCPs players of innovation
Smoothing a flawless care pathway
Improving the patient access to healthcare
Building an innovative team sharing the same values

Which services?

An ecosystem of services simplifying the daily life of HCPs, starting with booking appointment and TeleHealth

One ambition:

By 2021, become the leading digital healthcare assistant solution for HCPs

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Timeless:
HCPs running
after the clock

Timeless: HCPs keeping on having patients on the phone…

What’s evolving

#1 technology

© Cegedim 2018

Even though you always keep **the link with your patients**

© Cegedim 2018

So the technology will enable you to:

- Still perform a true consultation
- In a regulated way, in line with the new Health convention from Sept 15th
- Including video so it helps to be more reliable and create human relation
- In a securised and HDs environment
- Monetization
- Gain time and efficacy

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Ready

for the demo?

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GERSDATA

How data is driving **digital transformation**

David Syr
Managing Director Gers Data

Gilles Paubert
Global Head of Real World Data

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01 **Gers Data, the French data solutions for HCP digital's application**

02 **2 examples of digital solutions for HCP**

1. Pharmacists: Smart-RX 360 for pharmacist
2. Physicians: Rare diseases detection program

03 **Cegedim Health Data: a global team for a global RWD brand "THIN"**
(The Health Improvement Network)

04 **An example of an European solution: identification of patients with long-term conditions**

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If the Health Data Hub already exists !

Agnès BUZYN has launched the prefiguration mission of « Health Data Hub », a lab to harness the health data 12/06/2018

… The first mission of the « Hub » will be to ease the enlargement of the SNDS to clinical data

Health Data Hub exists already

THIN
THE HEALTH IMPROVEMENT NETWORK

The reference Real World database
By
GERSDATA

© Cegedim 2018

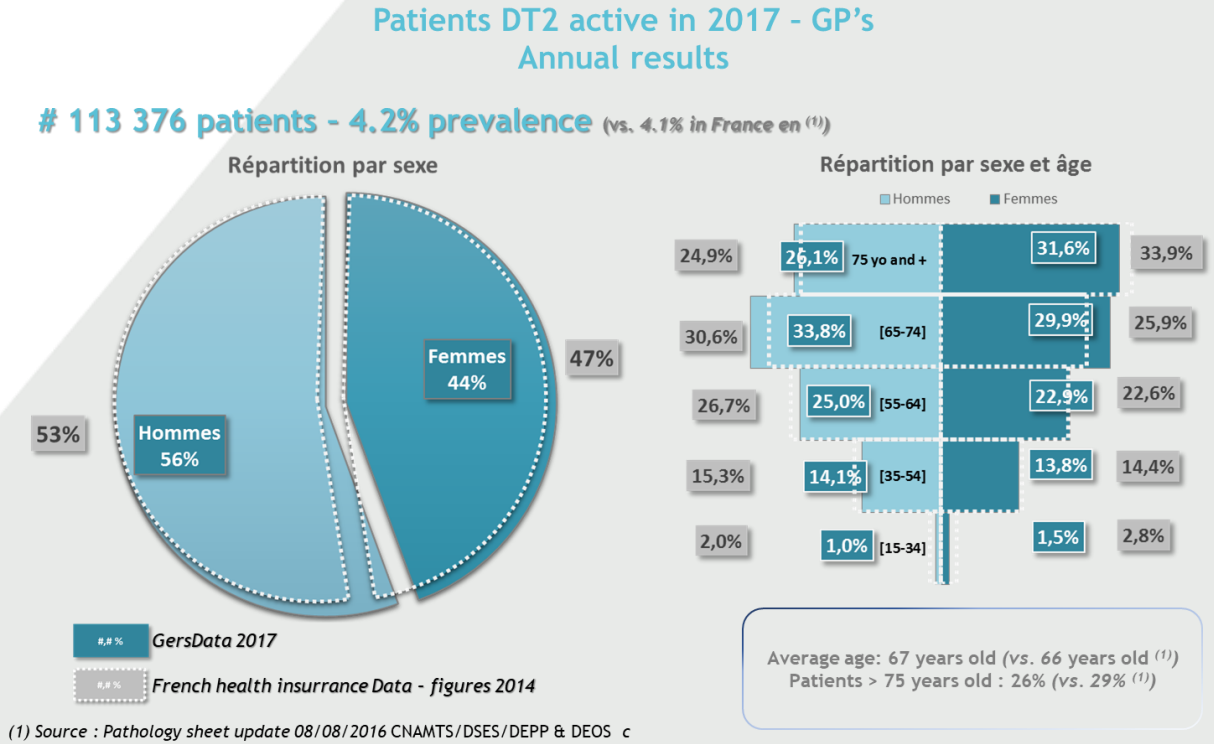
GERS Data follows the « 3 Q » rule

- The data :
  - 4 millions of patients in 2018
  - ~7 years of history per patient
  - Fully irreversibly anonymized

- The patient life line over the time :
  - Diagnostic
  - Prescriptions
  - Drugs dispensing
  - Hospitalization
  - Lab test

GERS Data is also used by health authorities (CEPS…)

Reimbursement



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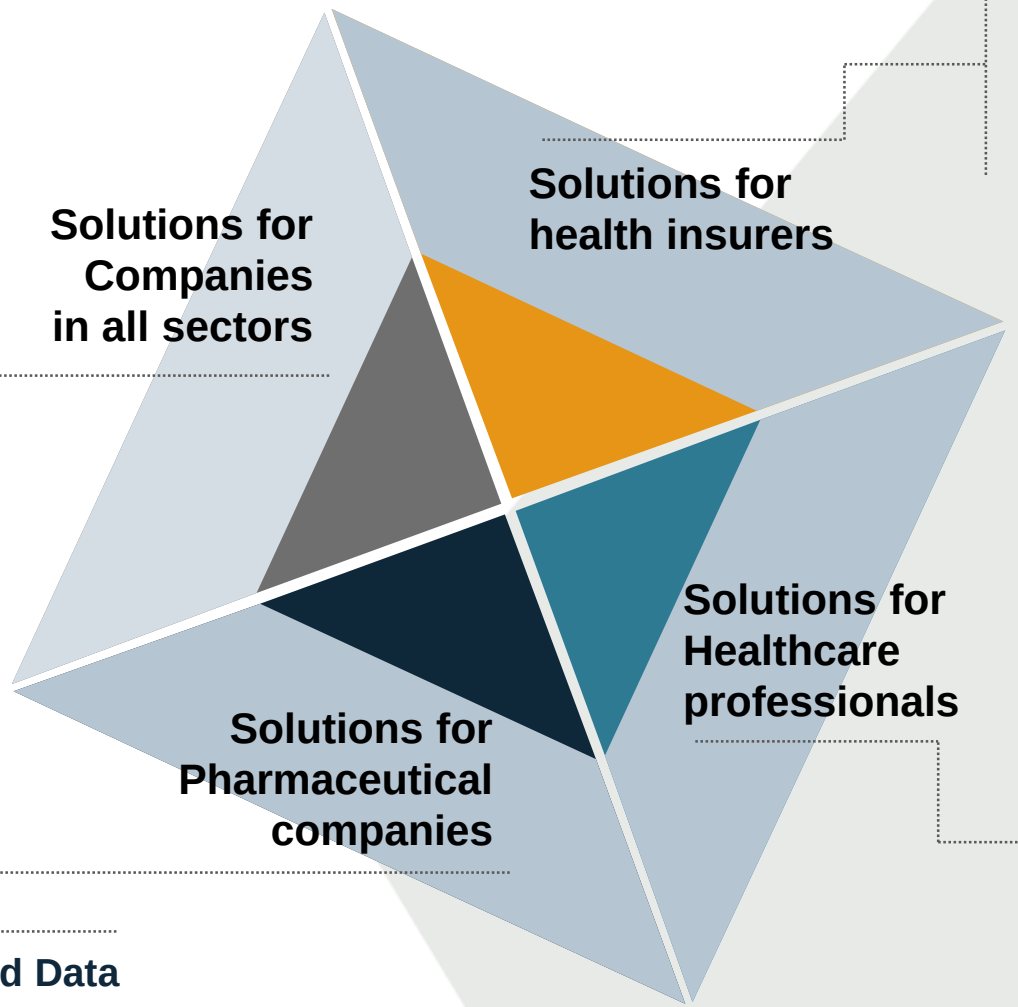
Gers Data and HCP's software are part of Cegedim activities



Solutions for health insurers

- Intermediation platform
- Information system for health insurance

Solutions for Companies in all sectors

- Cegedim Outsourcing
- Cegedim e-business
- Cegedim SRH / Payroll and Human Resources

Solutions for Healthcare professionals

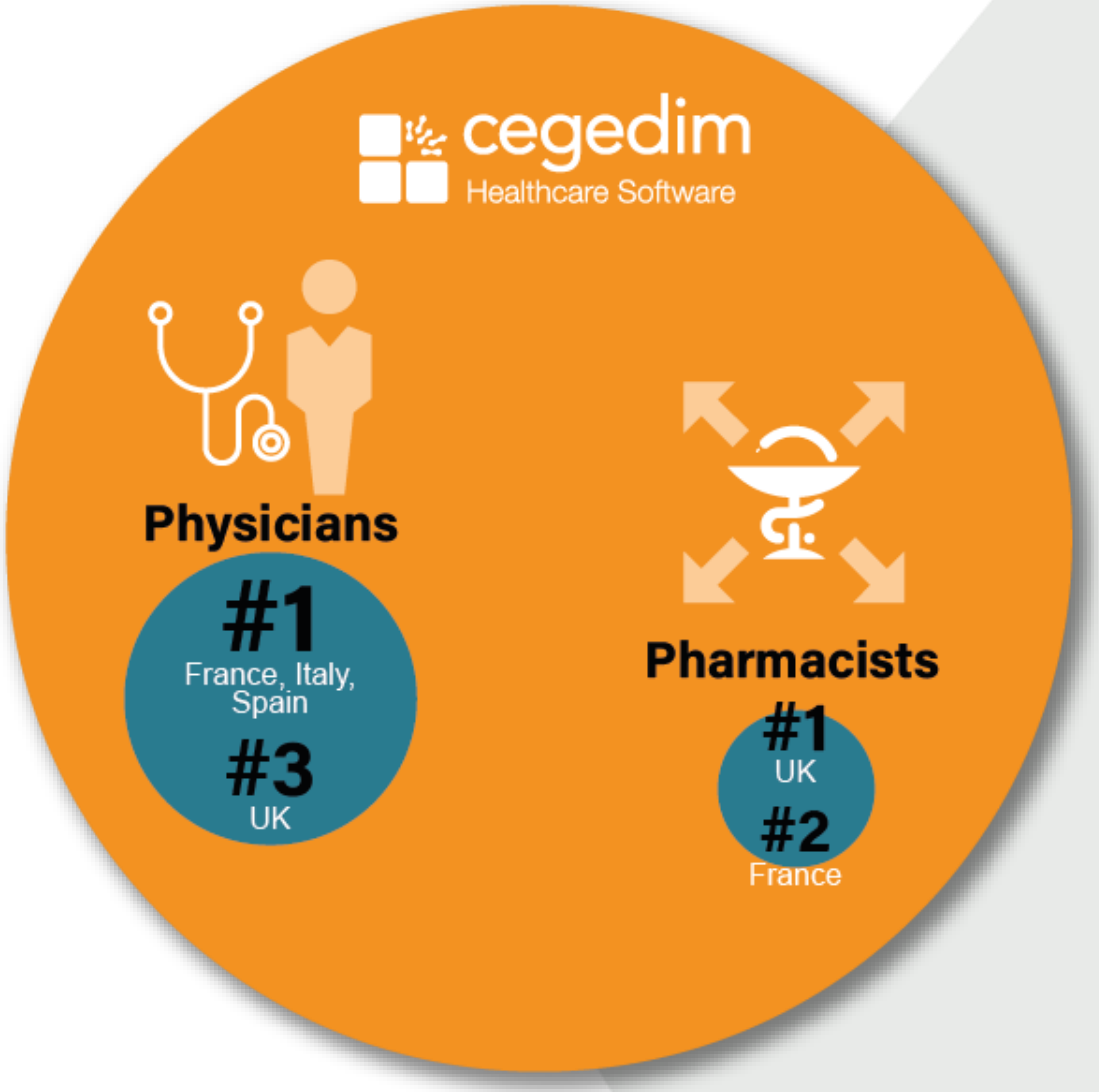
- Software for health centers
- Software for doctors
- Software for paramedics
- Software for pharmacists
- Medication database
- Secured Data Hosting

Solutions for Pharmaceutical companies

- Real World Data
- Sales statistics

© Cegedim 2018

Cegedim HCP's software leading market position and main health data provider in France



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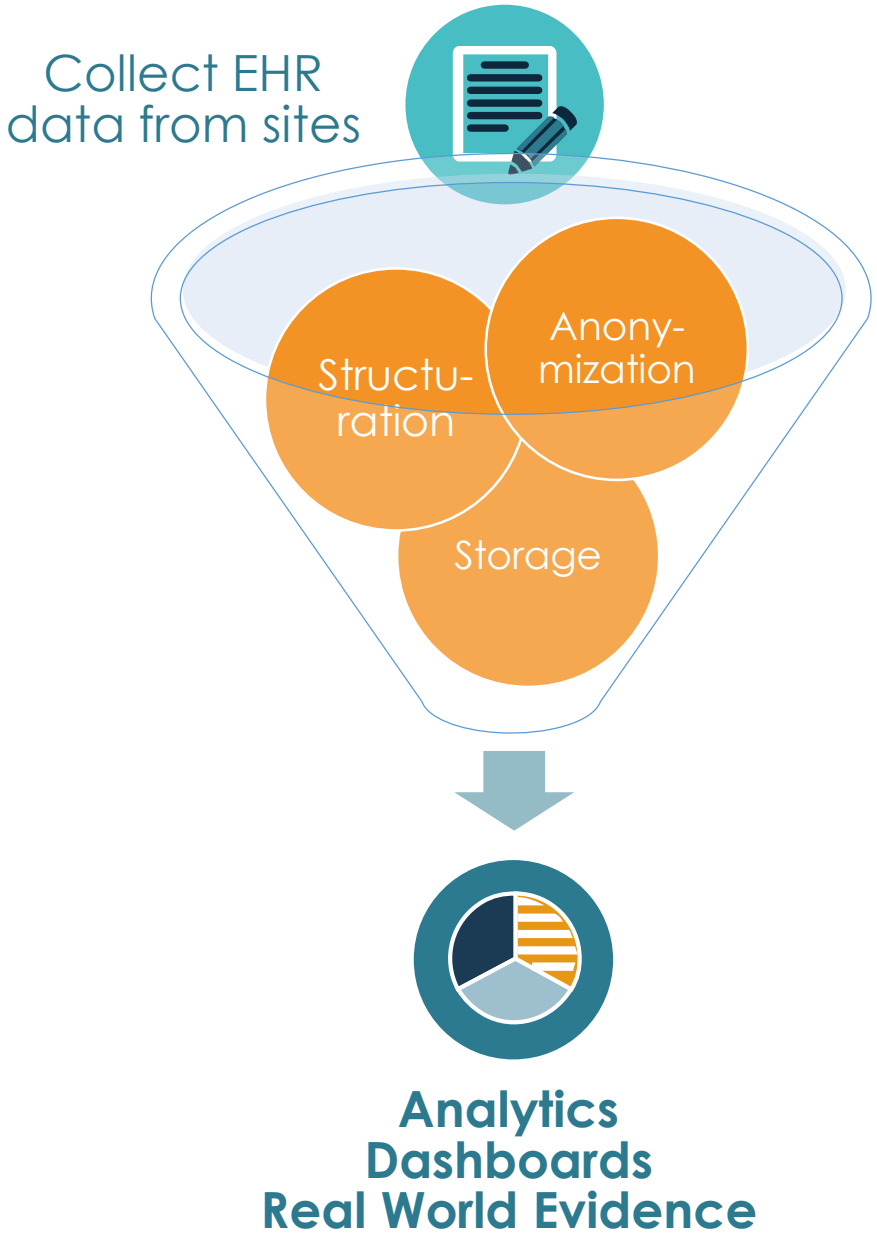
GERS Data, a dedicated R&D team to produce high-quality real world data

- Because Cegedim has a deep IT and software expertise, we are able to **collect, structure and produce** patient database, **available immediately** for the users

- The Cegedim databases **complies** with the relevant applicable **data protection laws,** are **fully anonymised** and data collection is subject to a **contract**



THIN ®™ is a Cegedim - proprietary database and registered Trademark

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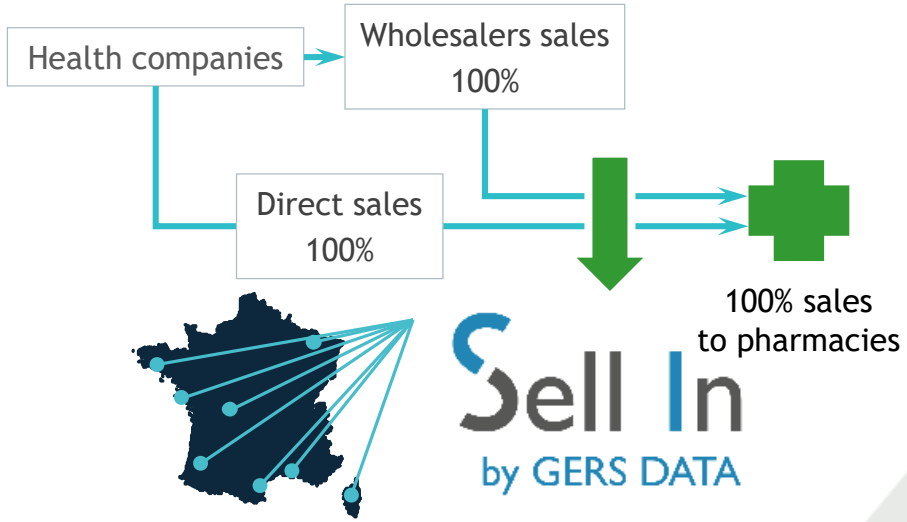
Actionnable data from pharmacists software to increase the precision of the Sell Out GERS

An unique view thanks to the Sell In GERS



100% of pharmacies

- Reimbursed drugs
- OTC
- Medical devices
- Food supplements
- Dietary
- Dermo-cosmetic
- Etc…

An augmented precision with the Sell Out GERS

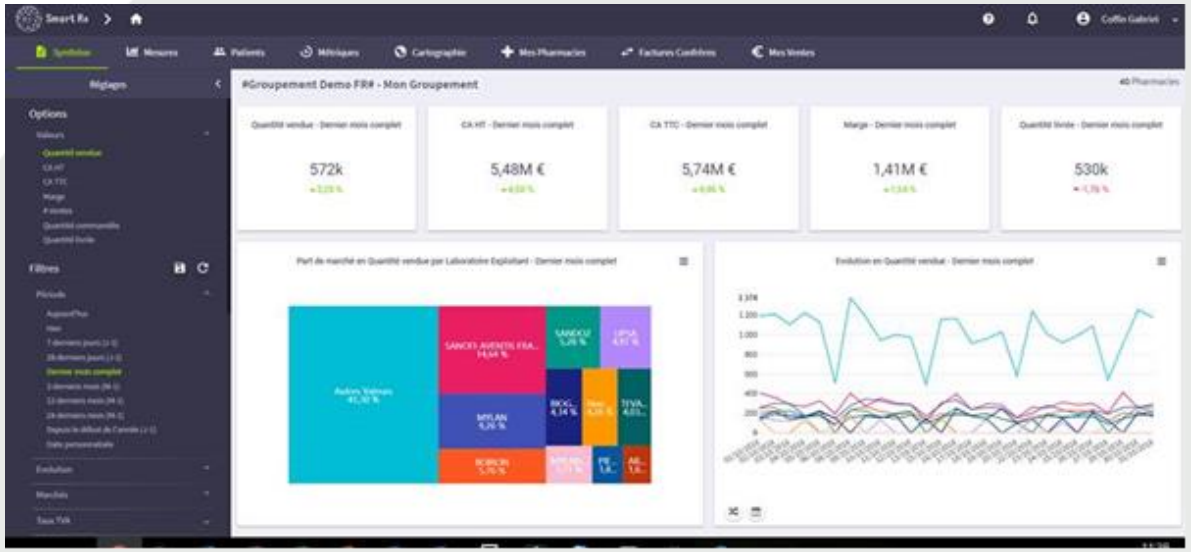
10 632 Pharmacies under contracts with CEGEDIM

- Purchases
- Sales

For 100% « market » references sold in pharmacies

© Cegedim 2018

Actionnable data for pharmacists' activities in France: Solution Smart-RX 360 pharmacists groups



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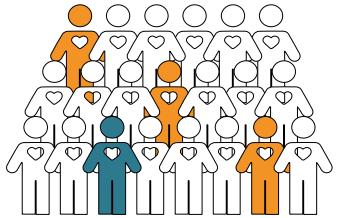
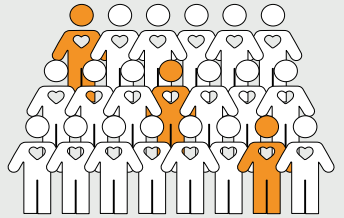
An example of actionable data for physicians' activities in France

- Rare diseases detection





Identify diagnosed patients into THIN

Analyze medical history, characteristics of diagnosed patients

Define an algorithm based on triggering criteria

Implement the algorithm in HCPs software

Help physician to make a decision for new patient management

cegedim Healthcare Software

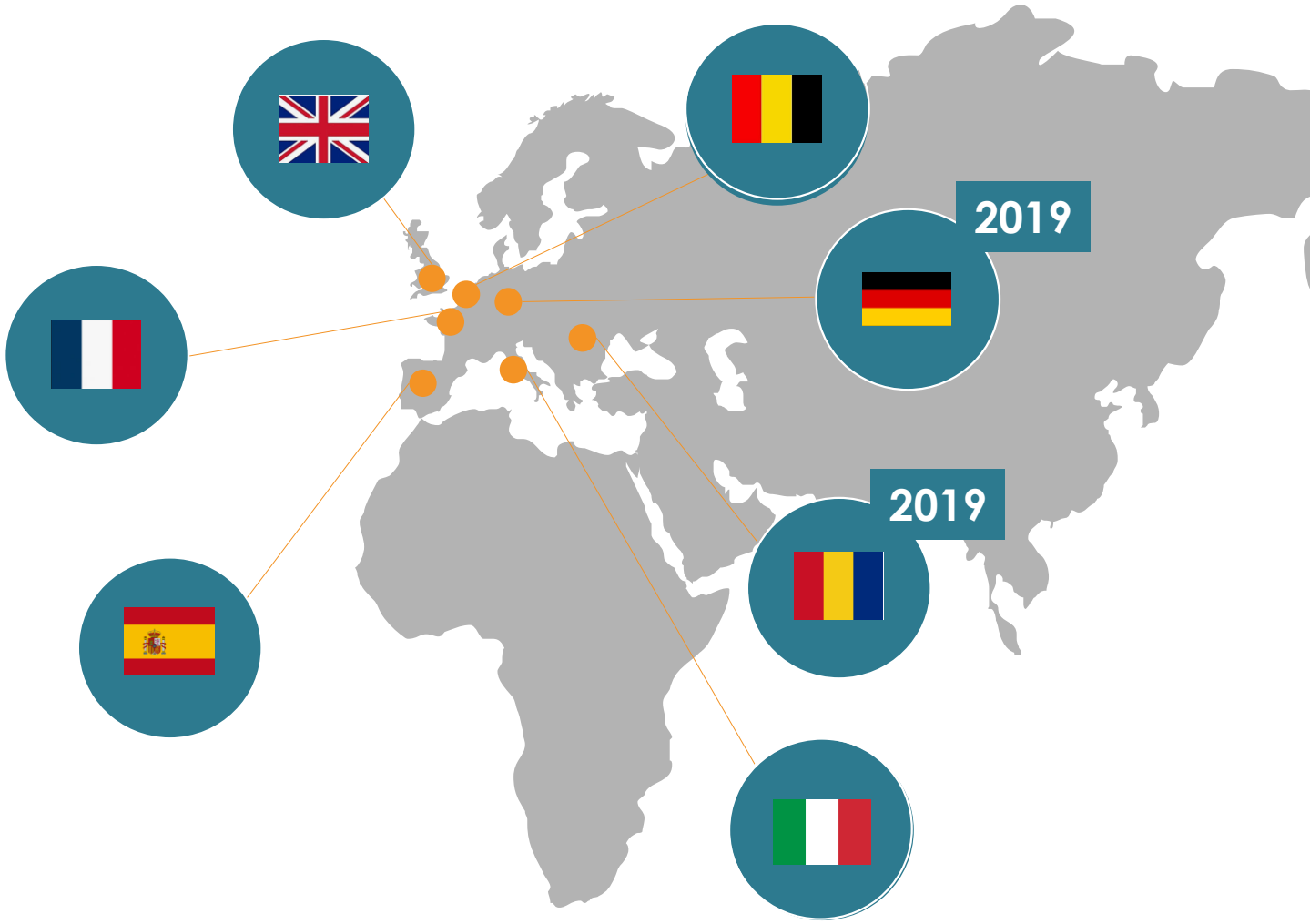
23,000 physicians, incl. **14,500 GPs**

© Cegedim 2018

Cegedim Health Data: a key player in Europe

THIN
THE HEALTH IMPROVEMENT NETWORK

> 54 M patients (FR/UK)
> 5,4 M active patients since **1994**
~7 years of history per patient
An **immediate access** to data for AI applications & action



Anonymized Data reference for
- **Health Authorities** in FR and UK
- More than **600** publications

The Cegedim databases complies with the relevant applicable data protection laws and are fully anonymised
THIN ®™ is a Cegedim - proprietary database and registered Trademark
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Digital transformation drives changes in the international data environnent

- Thanks **Big Data technology**, the system is able to store a bigger amount of data from several countries

- The **Artificial Intelligence** applies on THIN transforms Real World Data into action, for HCP's and patients.

- Health Big Data and AI implemented at software level help **to develop**:
  - Patient records sharing between HCPs
  - Patient Pathway Optimization
  - Rare diseases detection
  - Population Health Management

- As requested by Pharmaceutical Companies & Health Authorities

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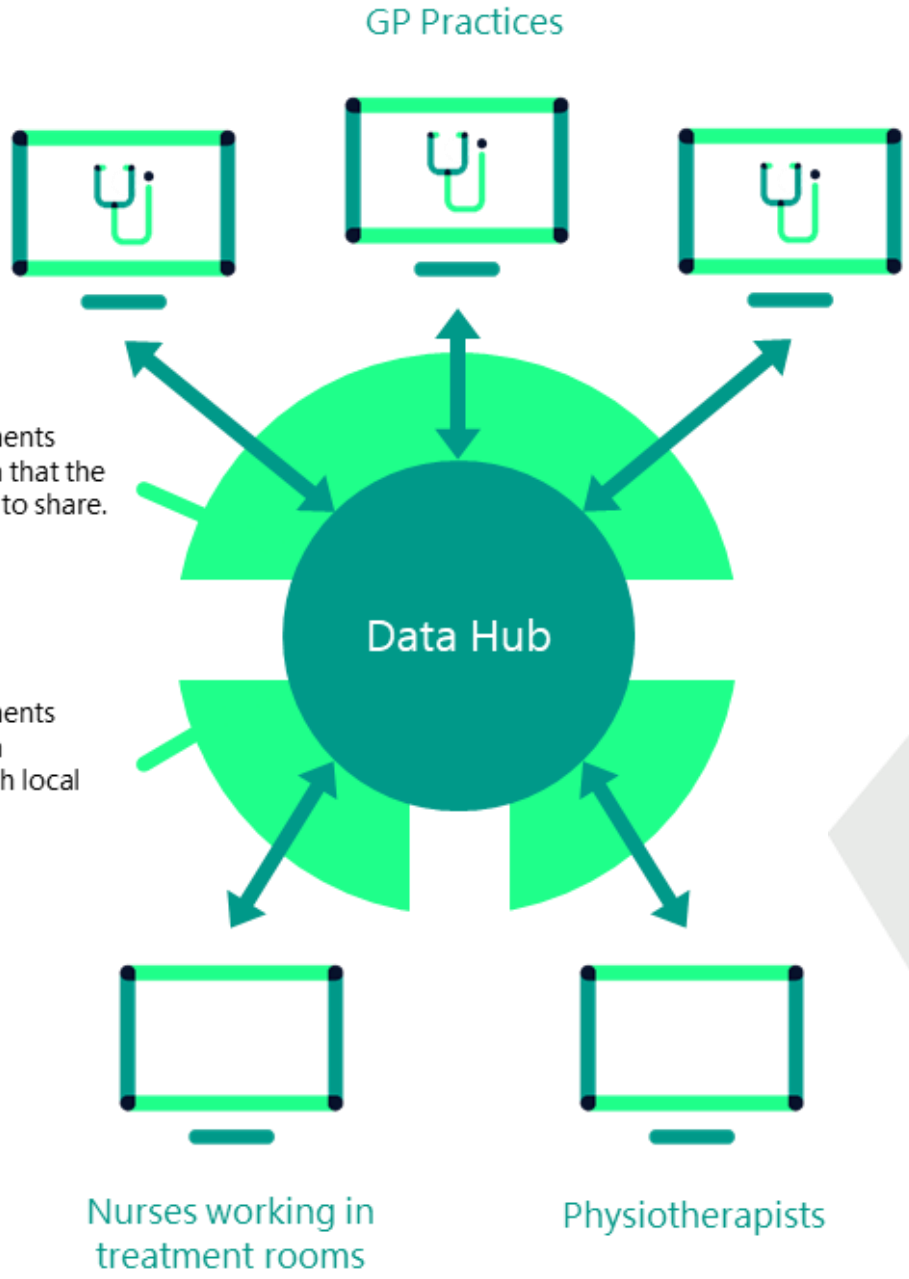
Share patient records with Physician software in UK: How does it work ?



1. **Consultation details** are streamed from the GP practices into the Data Hub. This is an ongoing autonomous background process

2. **Sharing agreements** control the data that the local GPs have agreed to share

3. **Service providers**, such as nurses working in hubs or treatment rooms, or physiotherapists access relevant medical information during episodes of care

4. **Sharing agreements** control the data available to each local service

5. **Details of the care** provided by local services are sent back to the patient's GP practice via the Data Hub

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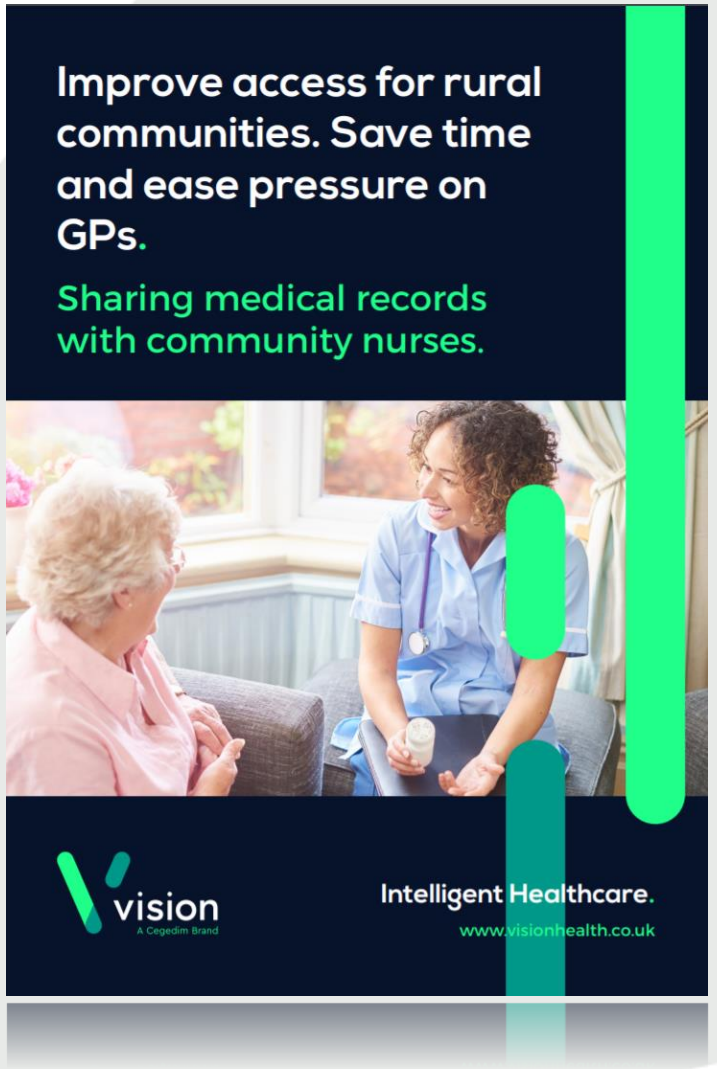
Share patient records with Physician software in UK: influence change !

- Vision's patient record sharing is allowing community nurses in the rural village of Letham to improve care for local patients.

- **Access to healthcare services has improved, the utilization of the nurse-led clinic has quadrupled, and the community nurses' caseload has halved.**



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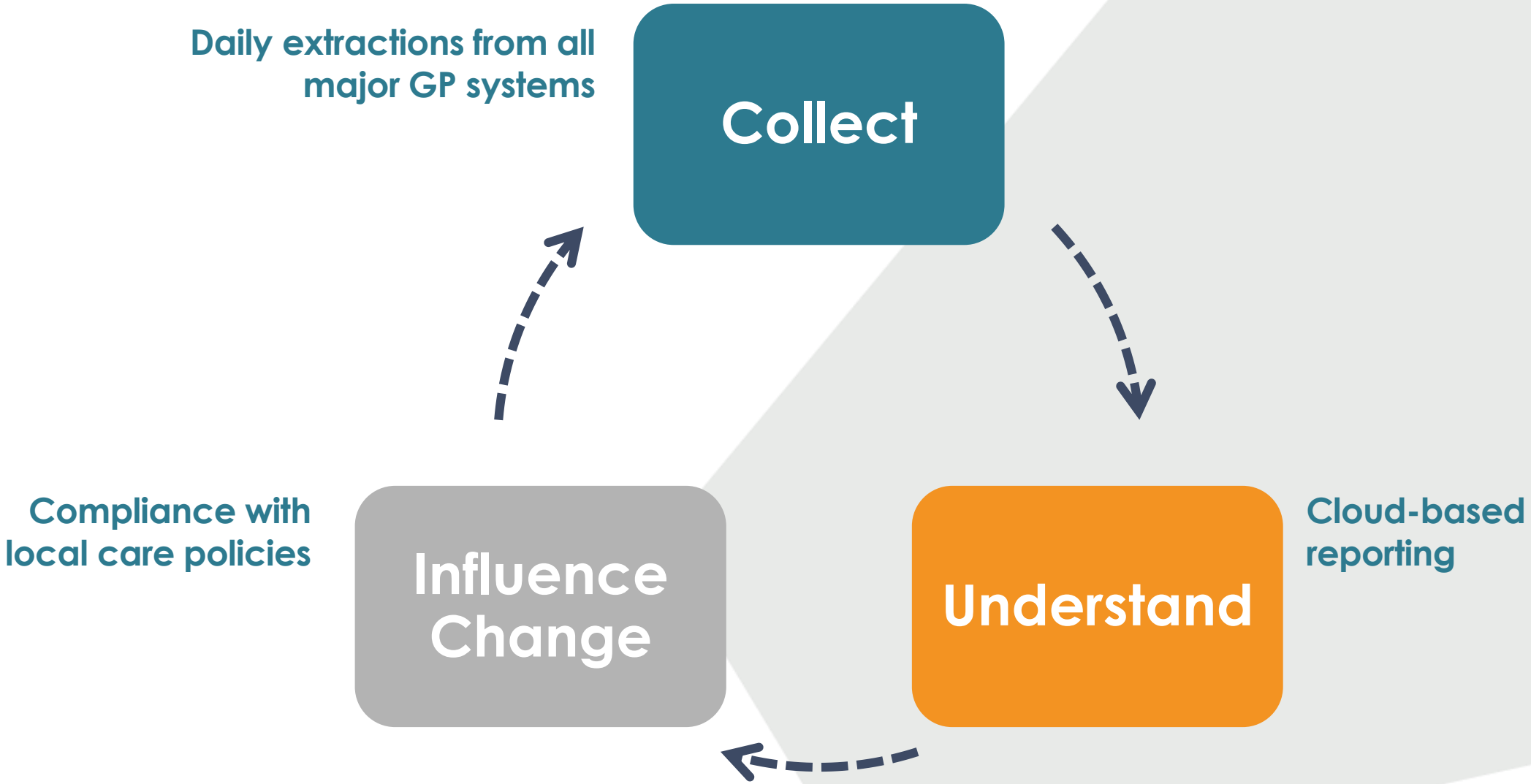
Population-level healthcare in UK: how does it work?



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Population-level healthcare in UK: influence change!

Outcomes Manager in action at a NHS CCG level

Outcomes Manager enabled NHS Greenwich CCG to effortlessly identify an additional 4,000 patients with long term conditions, reducing health inequalities and increasing life expectancy in the borough.

“ I was really impressed with how up-to-date data from all of our 39 practices across the borough was available for me to review in one central dashboard enabling me to track progress on the identification and review of patients with long term conditions and ensuring accurate service payments were made.”

Jan Matthews, Director of Commissioning at NHS Greenwich CCG

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Cegedim DIGITAL

cegedim.cloud

Digital trust builder

Frederic Le Guillou
Chief information Officer

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Positioning of cegedim.cloud

Datacenters France

- **6 datacenters** with 3 in France
- **Infrastructure** « Best of breed »
- **French TelCo operator** (CGIT registered to the ARCEP)
- **122 headscount**
- Multiples agreements and certifications

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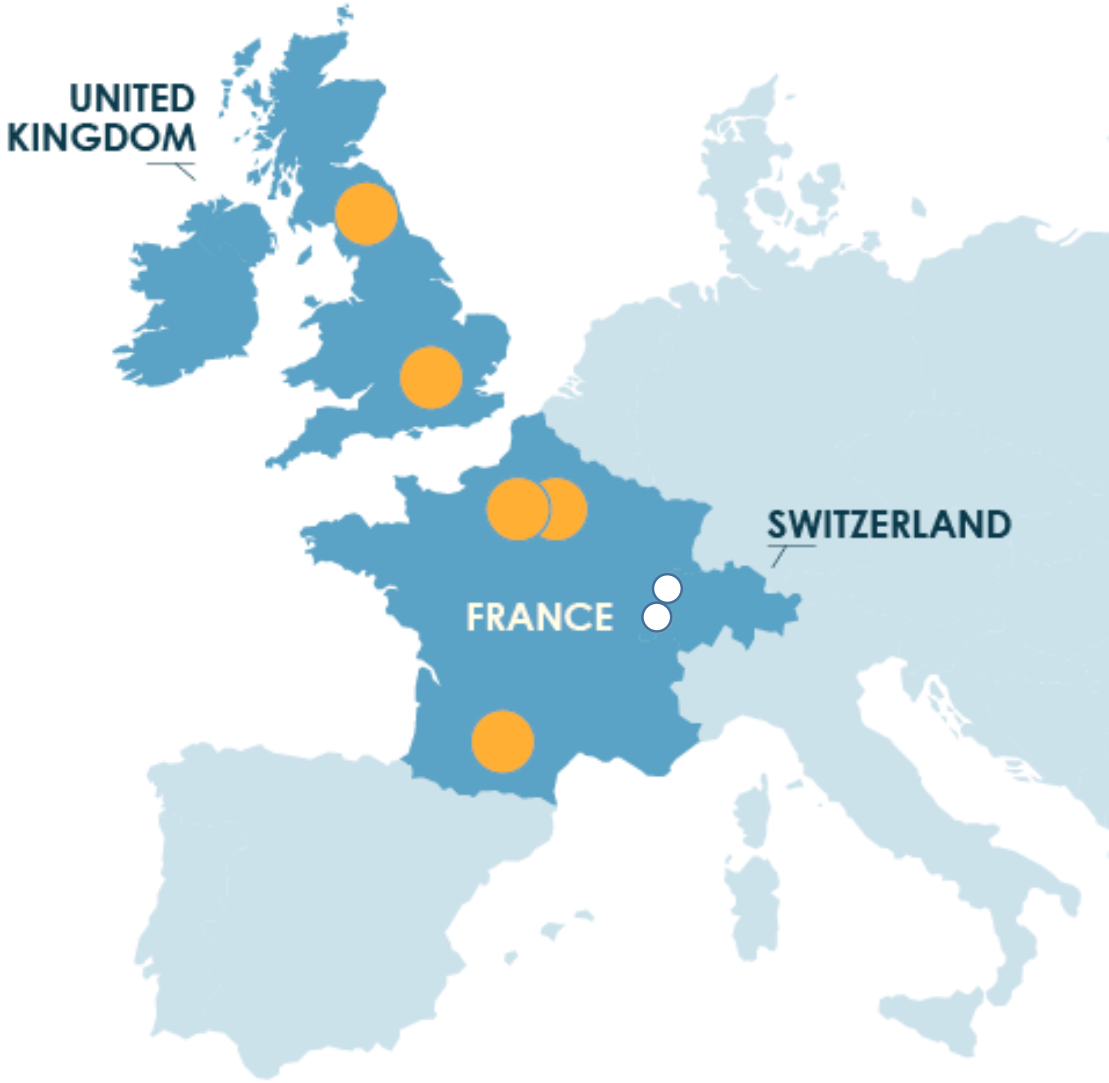
International presence



◯ Coming soon

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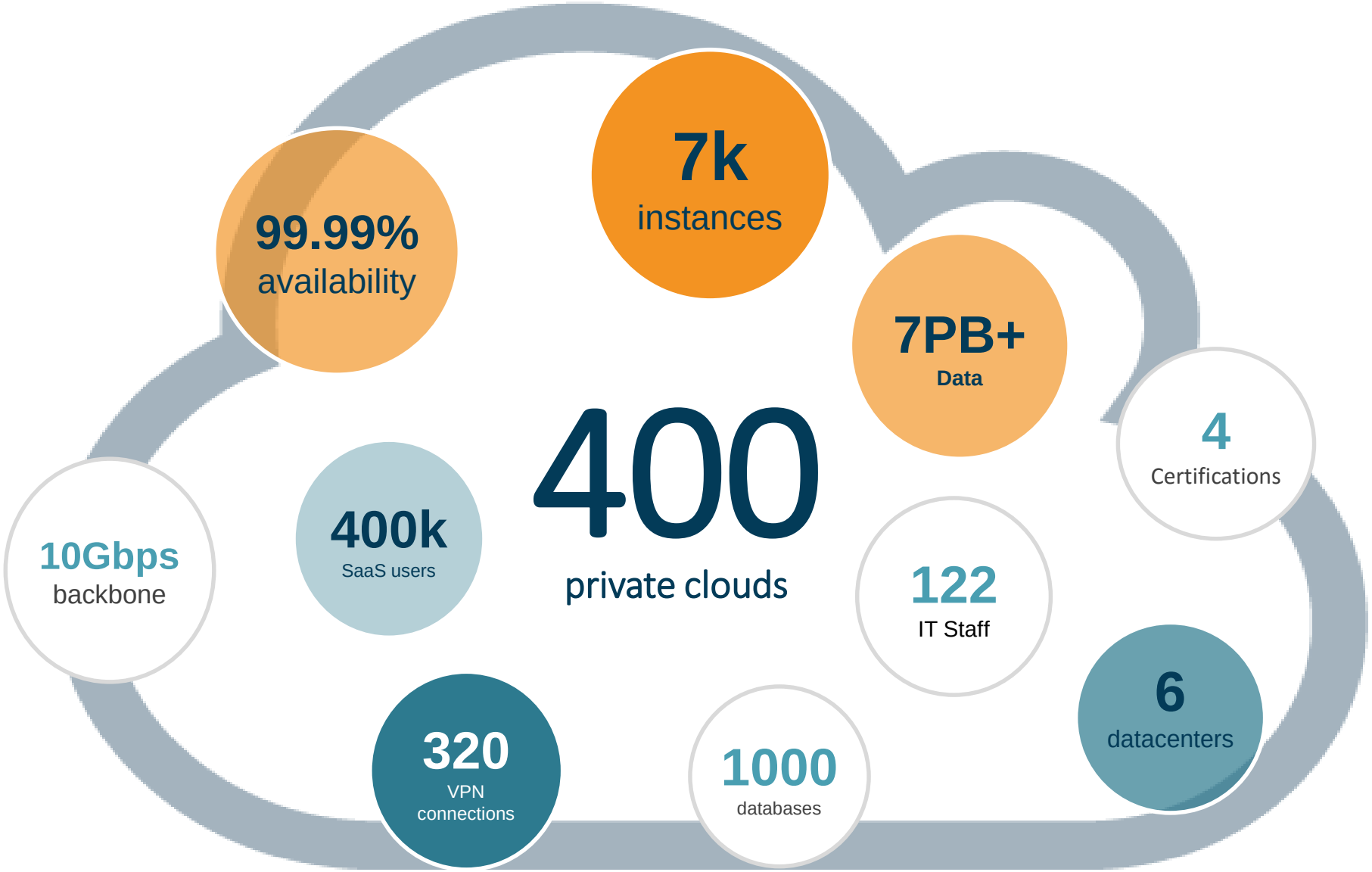
Key figures



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cegedim.cloud: our offer

Hosting

- Compute / Storage
- Managed/Secured platforms as a service (Databases…)
- Application management and user experience monitoring

Solutions

- Telco / Internet Provider
- Data and file exchange services
- SMS broker
- Cloud Storage

Professional Services

- Cloud Solution Architecture
- Outsourcing
- SaaS Maturity Coaching
- FinOps
- Security and Compliance

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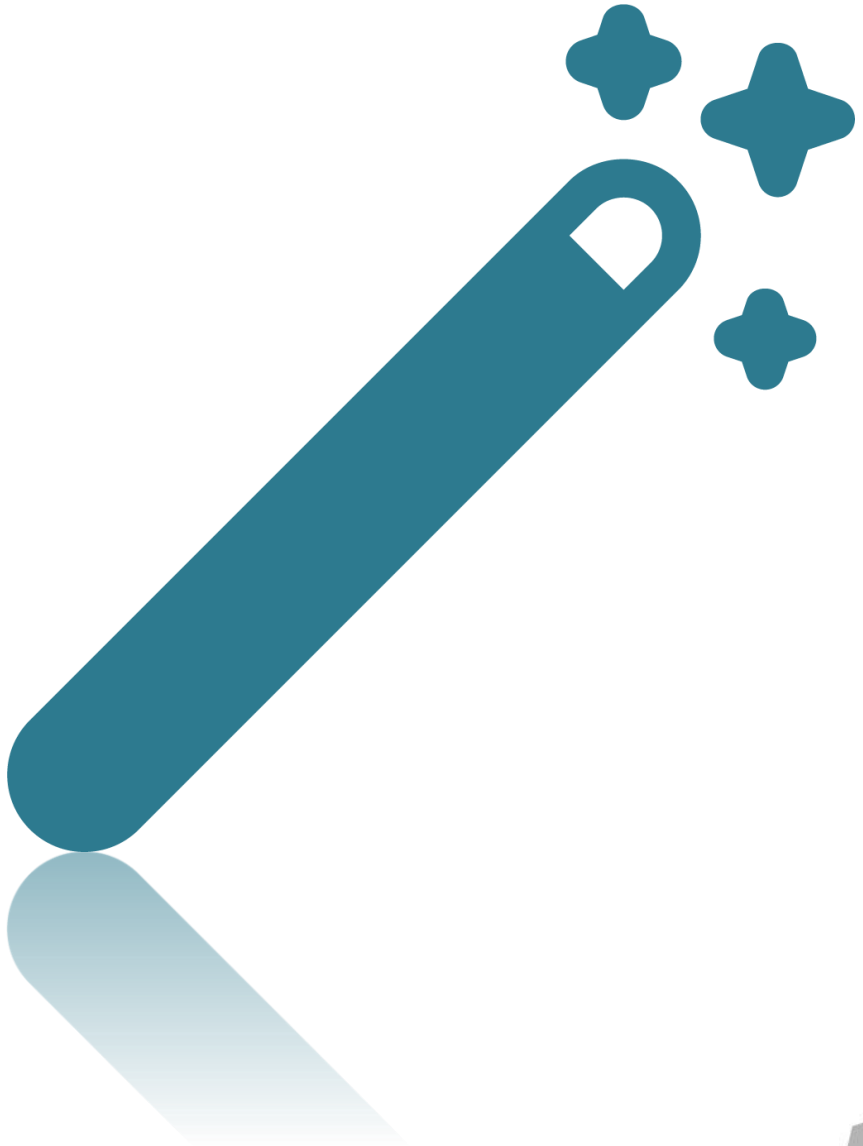
cegedim.cloud performed its own digital transformation 3 years ago !



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Five pillars as foundations

- **Customer Engagement**
  - Give them what they dream of !
  - Be the catalyst that fuels their innovation
- **Operational Performance**
  - Self care : divide by 10 the time to market of SaaS application
  - Automate everything, including Scalability / Performance / Availability / Security / Compliance
  - Predictable and optimal cost to master business model
- **Change Management**
  - Support and empower staff in the in-depth change of the strategy
- **Cutting-edge technology**
  - Encourage and enhance the innovation and creativity of developers
  - Data-driven : Artificial Intelligence / Machine Learning
  - Partnerships with the major IT players
- **Security and compliance by design**
  - Anticipate and influence security standard evolution
  - Report in real-time security status to customers and users.

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Digital Transformation Enabler

- **Helping our customers with our own experience in digital transformation**
- **Understand and contain Cyber-Risk**
  - Regulation Knowledge (Cloud Act…)
  - Cutting-edge Security By Design
- **Have a predictable cost model**
  - Build business models
  - Leverage Cloud capabilities (Pay per use paradigm)
- **Business Process Digitalisation requires Change Management**
  - Bring Awareness through trainings
  - Continuous feedback gathering
- **Adaptive and agile service offer (technology and services)**
  - For your customers : from a pharmacist to international group
  - For your company : from a start-up to a leading software publisher

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Digital Transformation Enabler

- **A strong experience at the service of the thirties Cegedim Group BU's digital transformation**
  - **cegedim.cloud** services agility and scalability to enable transformative re-engineering of business processes
- **An experience exported beyond Cegedim Group boundaries …**
  - through direct **cegedim.cloud** offer
  - Already engaged with more than 50 external customers
- **A wide range of customers that allows cegedim.cloud to be always at the forefront and an activator of innovation**

To help them to build the digital trust required by their own customers

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Cegedim

DIGITAL

cegedim
Insurance Solutions

Digitalizing company processes in the healthcare segment and beyond

Philippe Simon
CEO Cegedim Insurance Solutions BU

Pierre-Henri Comble
Head of Strategy Cegedim Insurance Solutions BU

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Cegedim DIGITAL

01 **Ongoing trends**
- Our 2016 vision
- What's new in 2018?

02 **Market impacts**

03 **How Cegedim Insurance Solutions is responding**

Introduction

Just like music, film, and photography, healthcare is being disrupted by digital technologies

- Paired with the rise of the internet, these new technologies allow real-time information sharing and provide users with the information they need, when they need it
- The array of communication technologies and formats available today is truly stunning
- Against this backdrop, this presentation aims to show:
  - The lasting impact of these disruptive trends
  - How they are affecting our markets
  - The new products and services they have made possible at Cegedim Insurance Solutions

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Ongoing trends…

Our 2016 vision (word for word)

- Rethinking the scope of supplemental health insurance policies with the concept of “responsible” insurance policies

Better results throughpatient empowerment!

- Online third-party payments expanding

Previously unavailable to all HCPs

- Market reaching maturity with respect to business process outsourcing (BPO) amid mounting pressure on management costs

Automation (self-care, chatbot, etc.) **is making inroads into Health insurer operations**

- Enhancing personal health data protection (cf. GDPR)

Making the processing, access, and use of personal data more secure

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Ongoing trends…

What's new in 2018?

- **Growth** in data flows continues
  - Corporate data (DSN social data reporting) is following in the footsteps of invoice data

Companies are becoming clients in their own right, alongside HCPs

- **Artificial intelligence**, backed by Big Data, is "infiltrating" management information systems (IS)

IS now incorporate algorithms that go beyond the rules of traditional management

- **Customer relationships** are developing through multiple channels

IS need to offer the same level of service across all formats available to users

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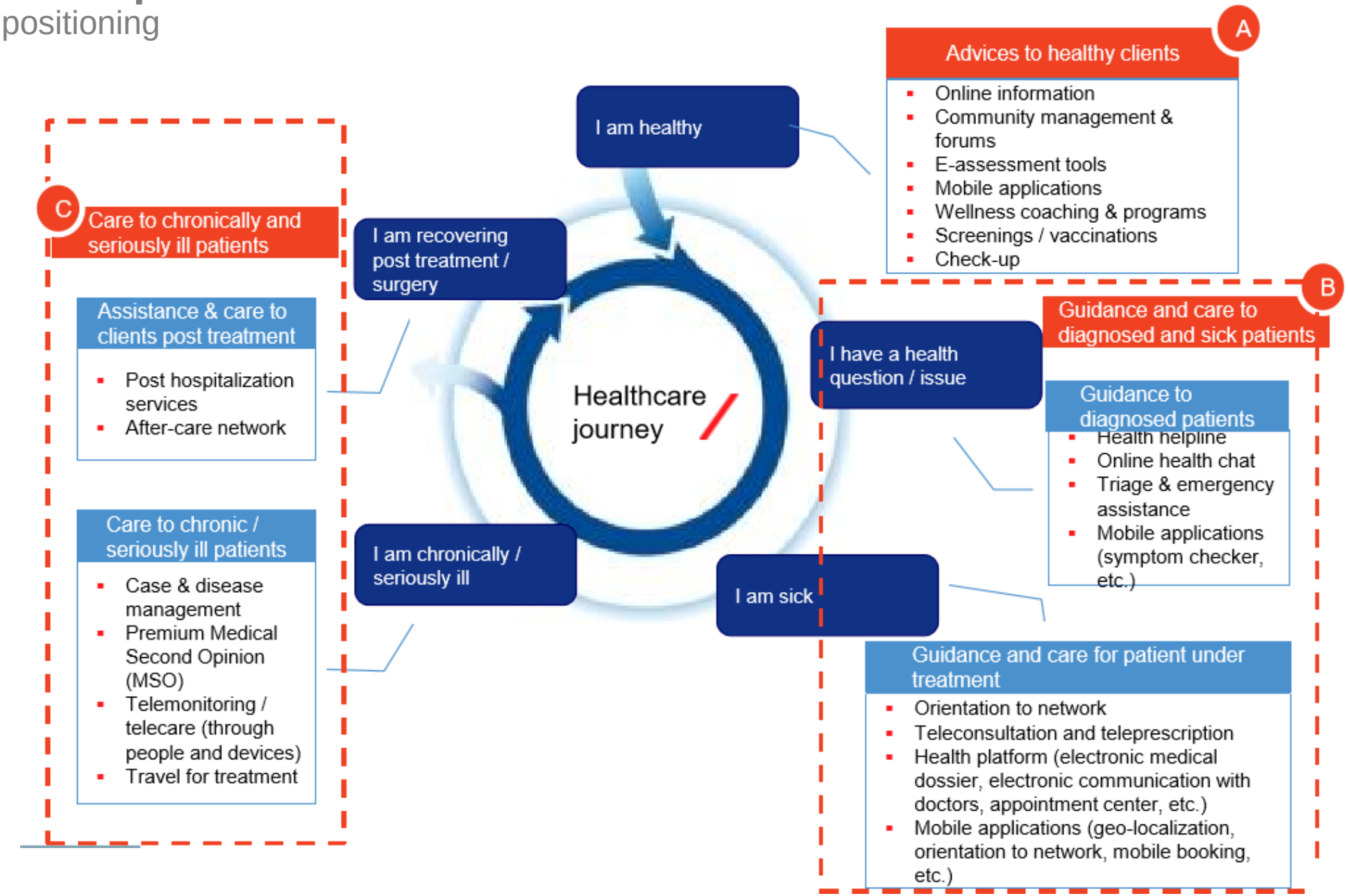
Market impacts

New positioning



Source : Axa, 2nd Healthcare Insurance Innovation Summit – Vienne 2017

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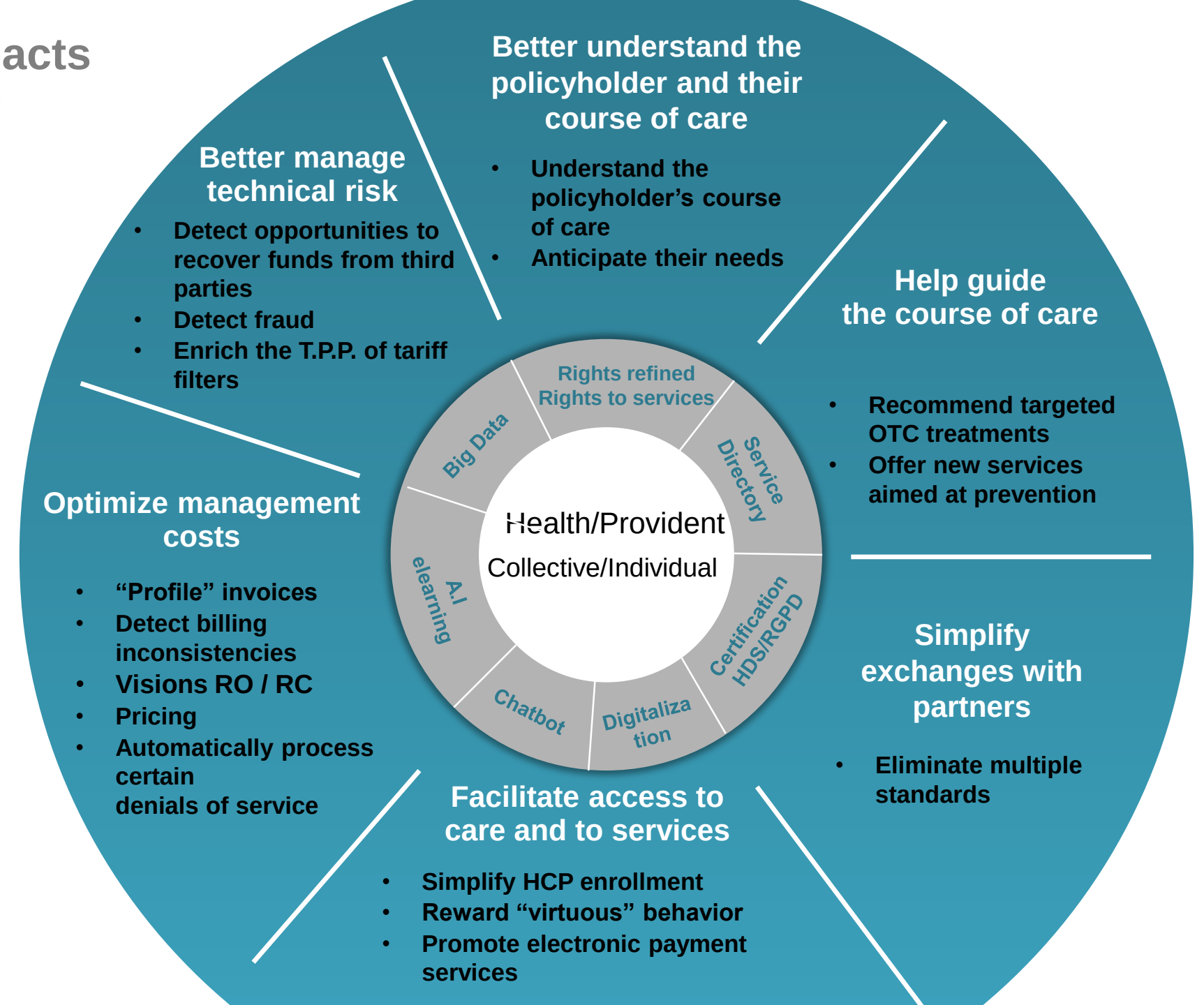
Market impacts

New positioning



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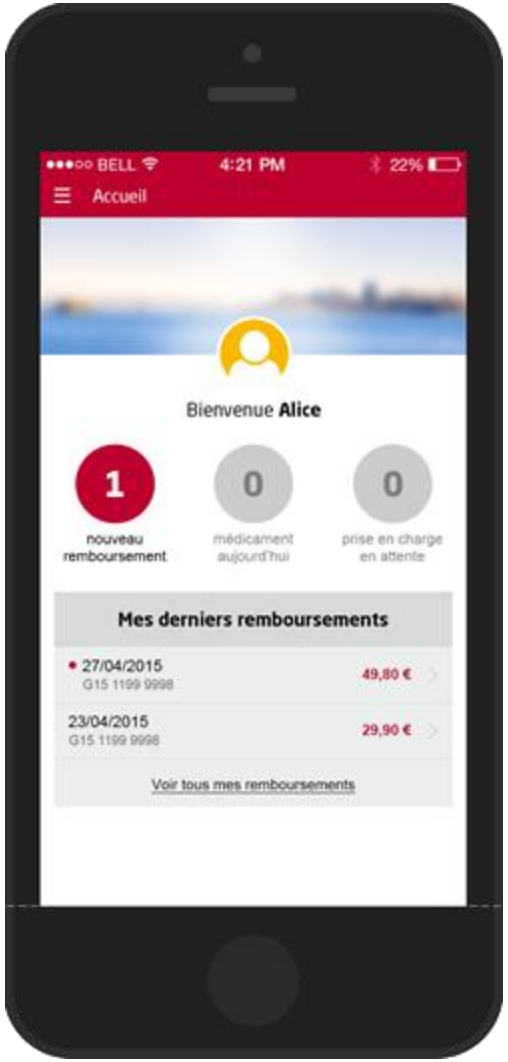
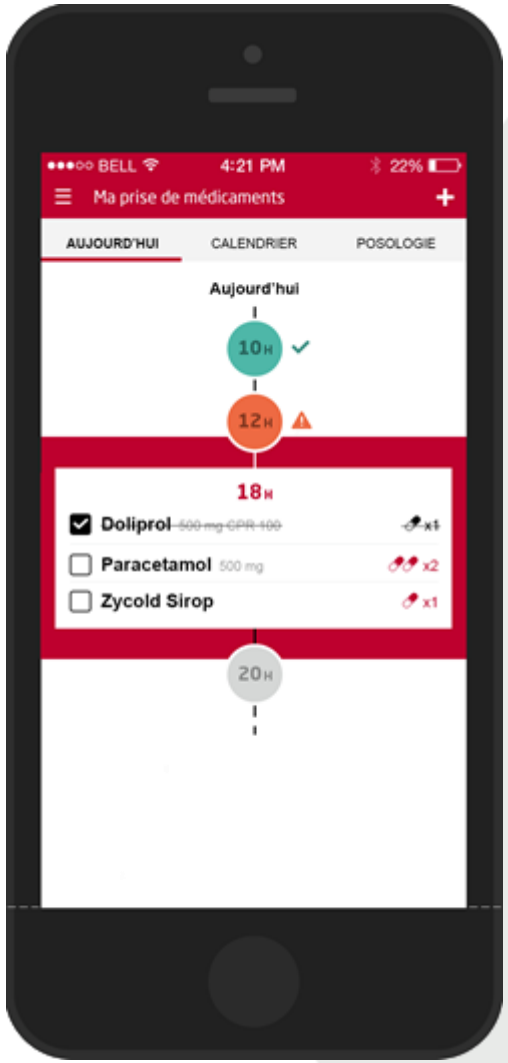
How Cegedim Insurance Solutions is responding

Example: digitalization of services – Mobile app for policyholders

Recent payments



Medication reminder



HCP finder

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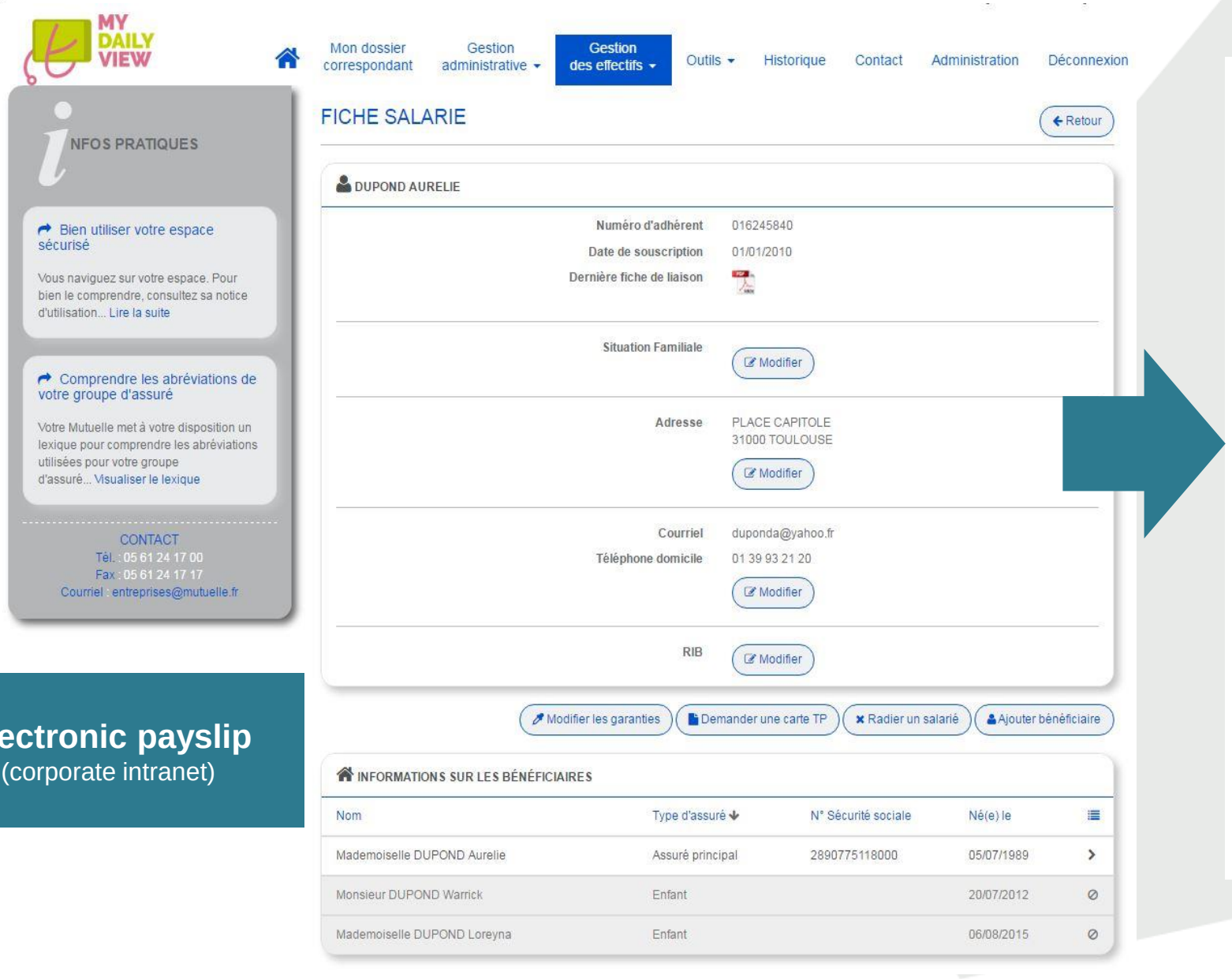
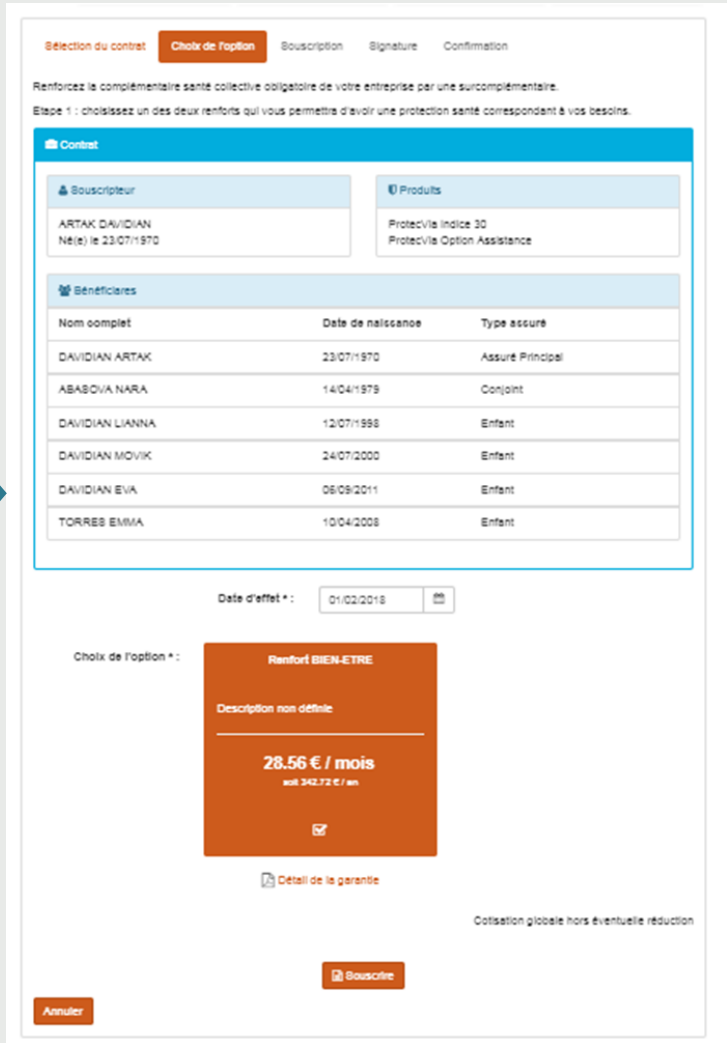
How Cegedim Insurance Solutions is responding

Example: digitalization of services – Self-care

Electronic payslip
(corporate intranet)



Adding extra coverage
(policyholder portal)



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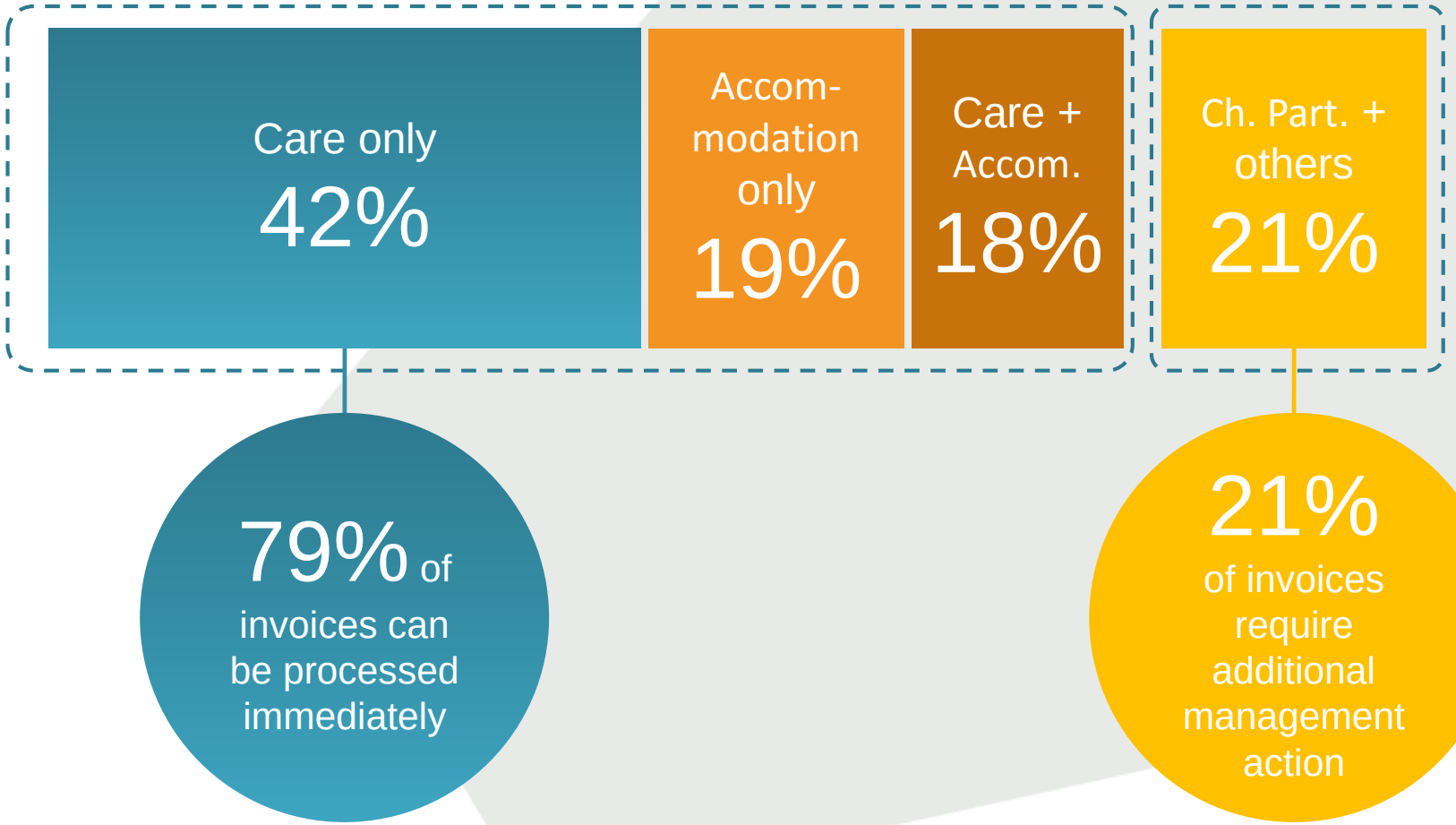
How Cegedim Insurance Solutions is responding

Example: Big data services – Sorting hospital invoices by type

How we add value:

- Simplify the invoice payment process by factoring in the invoice type
- Offer insurers quick productivity gains

Possible invoice types for a hospital stay



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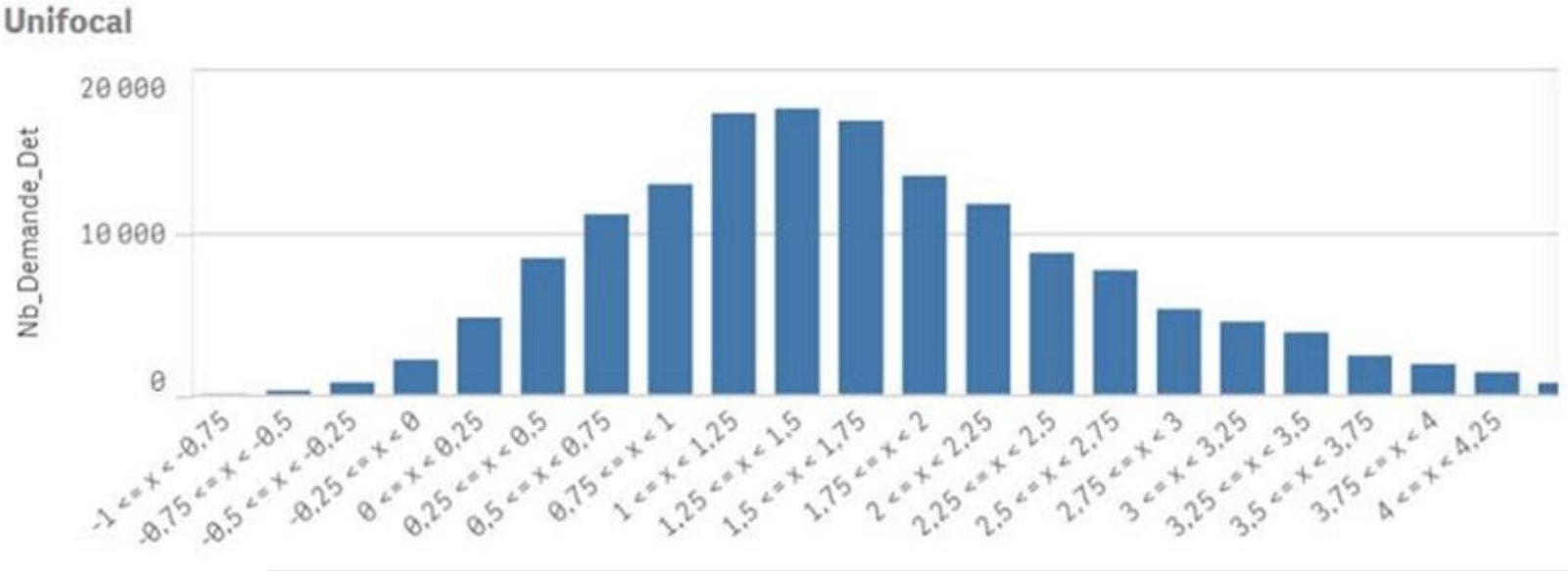
How Cegedim Insurance Solutions is responding

Example: Big data services – Optician pricing database

How we add value:

- Analyze pricing using the data collected from managing third-party payments to opticians
- Offer insurers tools for managing the underwriting margin against the backdrop of the “100% Santé” reform without joining a network
  - Either upon delivery of claim acceptance
  - Or by educating policyholders

Single vision lens prices



% difference relative to maximum purchase price

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How Cegedim Insurance Solutions is responding

Example: Big data services – Scoring policyholders

How we add value:

- Help our clients better target interactions with policyholders and the services they offer them
  - Create policyholder cohorts
  - Examples: periodic users, cardiac patients, emergency room visitors
  - Anticipate changes in how they use care
  - Factor this information in when determining what services to offer each policyholder, using a “Healthcare CRM” approach

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Examples of cohorts

Periodic users

Cardiac patients

Cluster	Nb Benef (RFM)	Age	Fréquence	PH_65	Med_Gen	Med_Spe	Med_Car	Med_Ped	Inf	Hospi	Kine	Urgence	SSR
Totaux	**59774**	**38**	**8**	**3,41**	**2,33**	**0,49**	**0,02**	**0,05**	**1,03**	**0,29**	**0,47**	**0,01**	**0,030**

Planned hospitali-zation

Note: the variables presented here correspond to frequency of use over 12 months.
The most salient variables for each cohort are shown against a red background.

Emergency room visit

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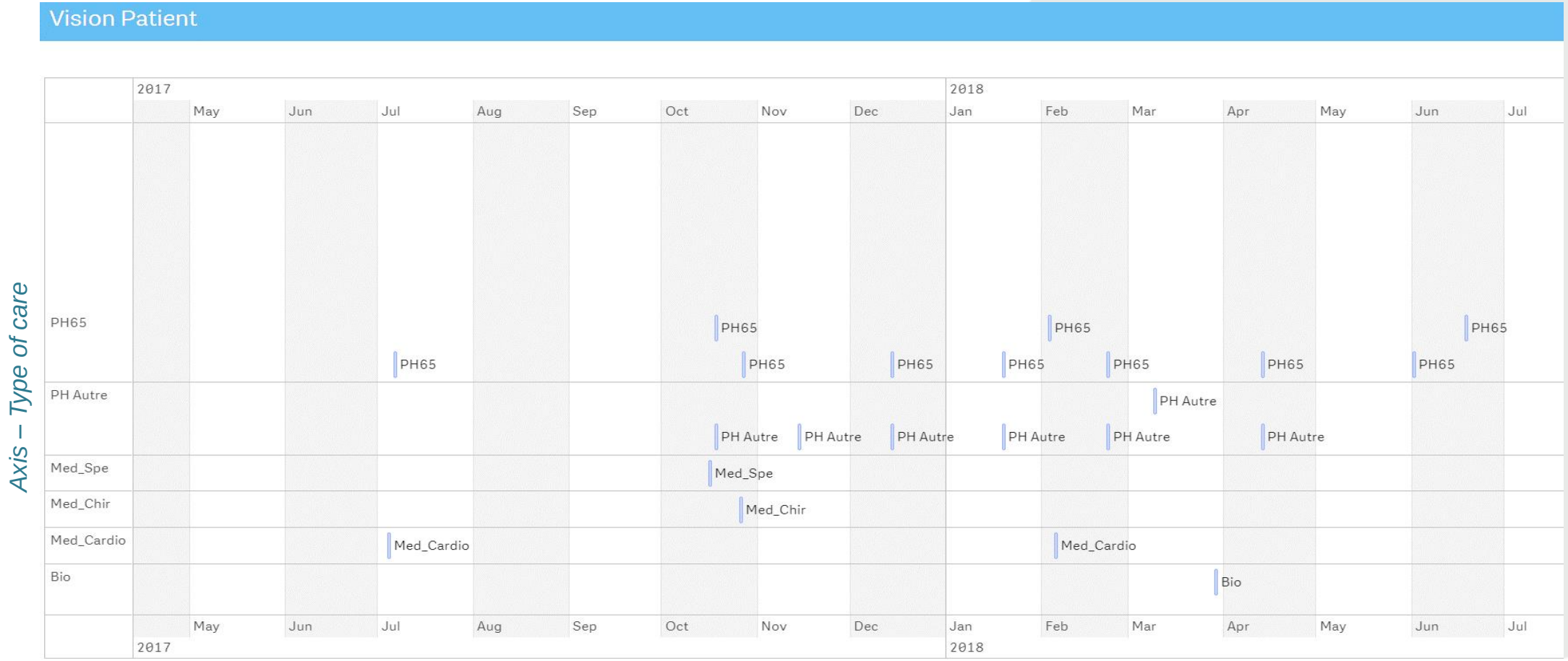
An example of a policyholder's course of care
Spotlight on the cardiac patient cohort

Sample course of care for a patient in the cohort



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SY by Cegedim
MAKE IT FLOW

Process Digitization
in and outside healthcare segment

Benoit Garibal
General Manager

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IS A DIGITAL NATIVE & DIGITAL EVOLUTIVE SOLUTION

For all **documents**

For **clients & suppliers**

For **invoicing**

For **purchasing**

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SY BY CEGEDIM: **a digitization solution**

SY FLOW

Digitization of invoices, orders and payments from a single platform.

SY GN

Business Process Management through configurable and adaptable electronic signature & business e-books,.

SY DATA

Data expertise to drive business, monitor the flows, undertake gap analysis and improve performance.

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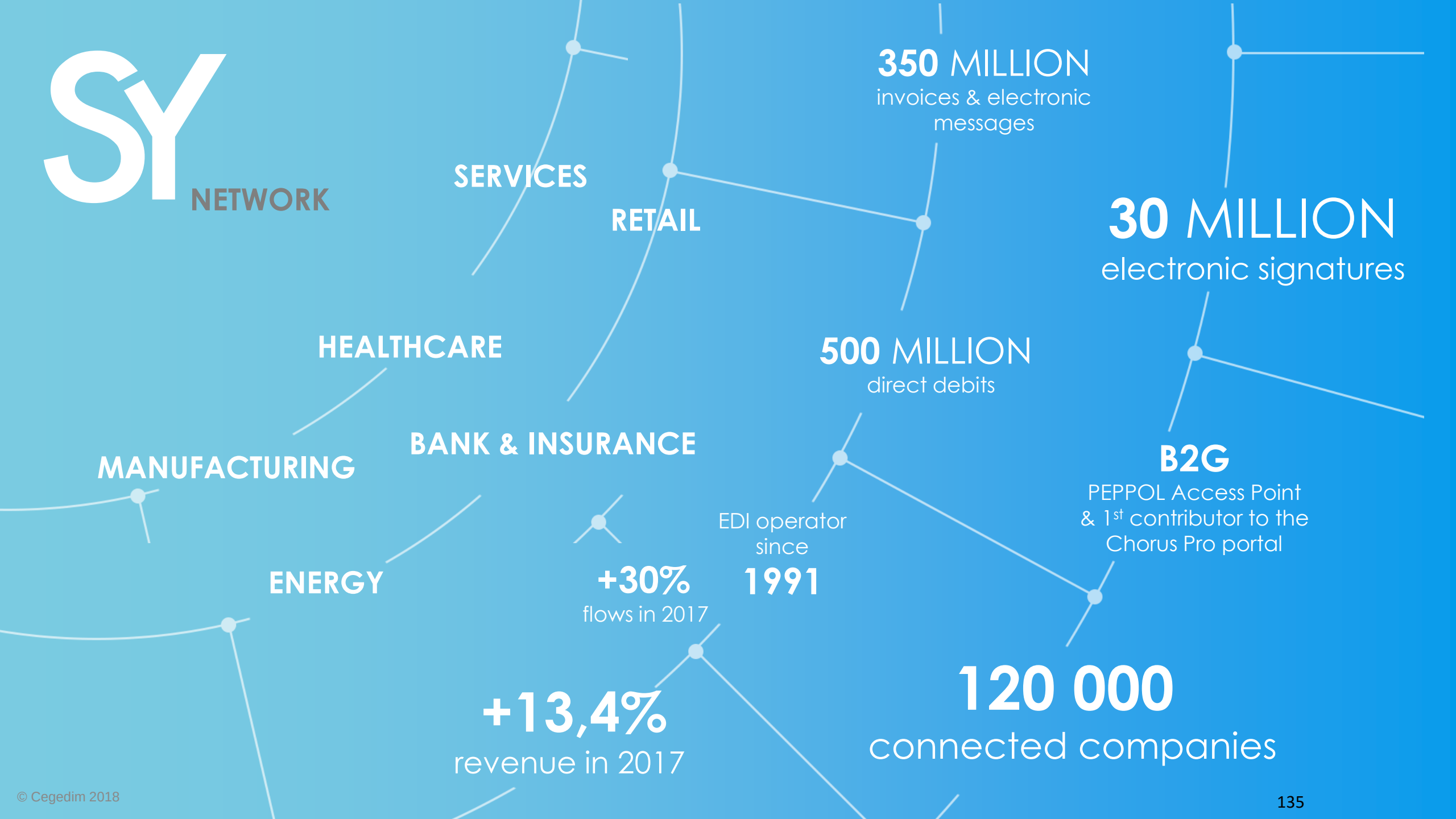

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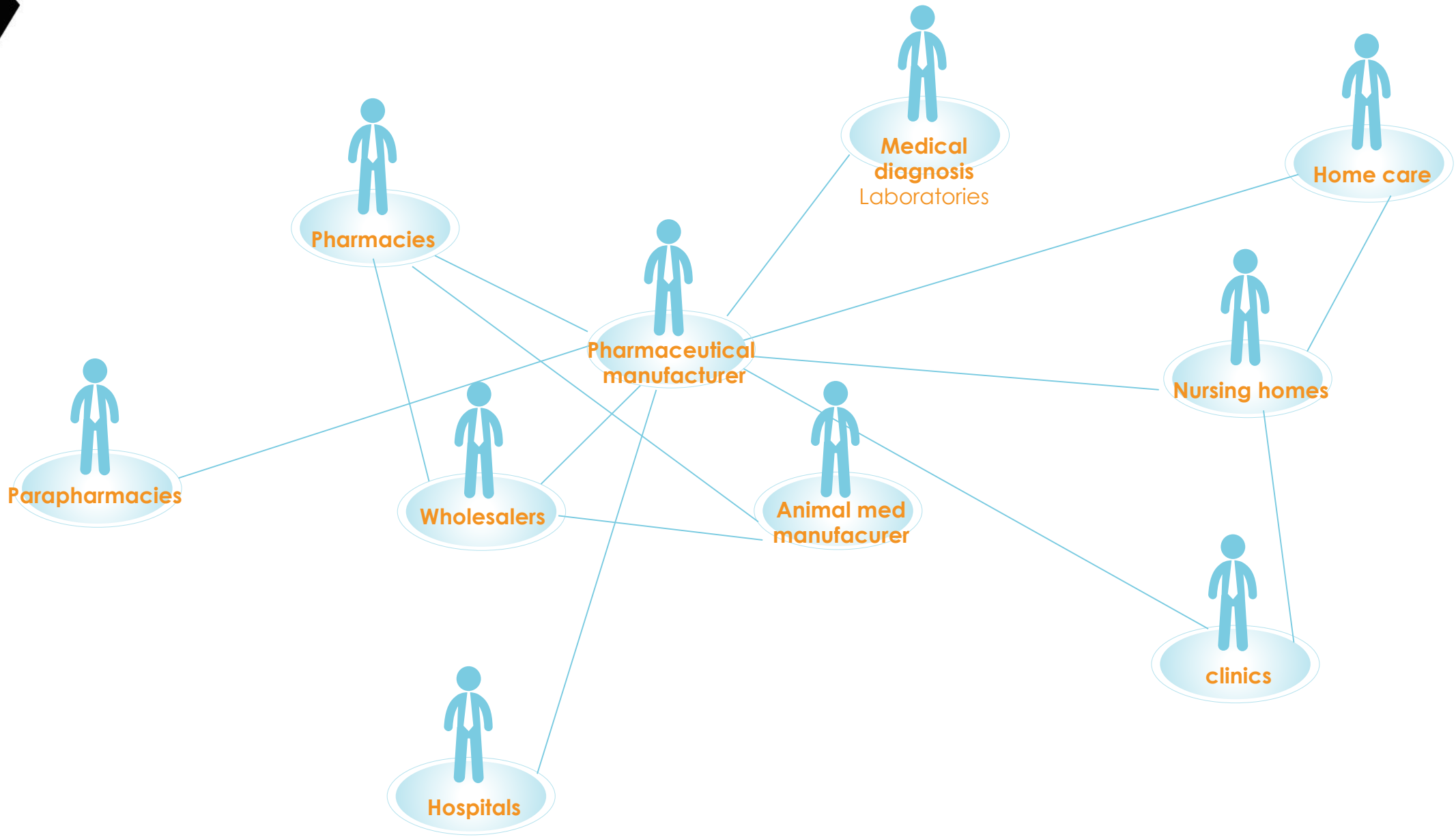
SY for the healthcare industry: a collaborative ecosystem



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SY FLOW for the healthcare industry: digitization of the supplychain

Pharmaceutical Manufacturer

Pharmacy

Hospital

Diagnosis Laboratory

Wholesaler

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Focus on the **healthcare applications**

PHARMACISTS	HOSPITALS	MEDICAL ANALYSIS LABS
SY PHARMA	Hospitalis	diagdirect
22 000 PHARMACIES	1400 HOSPITALS	INVOICING
DIRECT SALES	INVOICING	**E-PROCUREMENT**
INVOICING	**ORDER**	**4000 DIAGNOSIS LABS**
CROSS CANAL	CATALOG	CATALOG
CATALOG	**FLOW TRACABILITY**	

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Cegedim Financial Communication

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Outlook: Cuatiously Optimistic for 2018

- In order to position itself as a major telemedicine player in France, the Group has decided to make a meaningful investment in its appointment scheduling and remote consultation platform, Docavenue.

- The Group expects for 2018:

L-f-l REVENUE	FY 2018 EBITDA
Moderate growth	Stable compared with 2017

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Potential Impact of Brexit

Cegedim operates in the UK in local currency, as it does in all the countries where it operates

No major European health program is at work in the UK

The impact on the consolidated Group EBIT margin should be marginal

UK REVENUE

10.9%

As a share of 2017 consolidated Group Revenue from continuing activities

UK EBIT

14.0%

As a share of 2017 consolidated Group EBIT

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Cegedim Financial Calendar 2018 -2019

OCTOBER	DECEMBER	JANUARY	MARCH
25	11	29	27
Q3 2018 revenues	9th Investor Summit	FY 2018 revenues	FY 2018 results

MARCH	MAY	JUNE	SEPTEMBER
28	15	19	19
SFAF meeting	Q1 2019 revenues	GM	HY 2019 results

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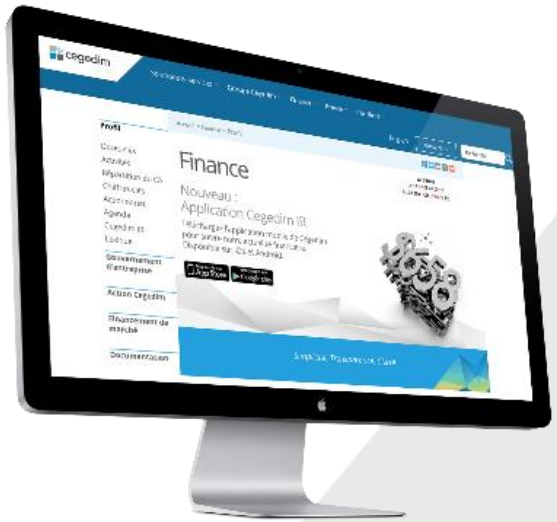

WEB SITE
www.cegedim.com/finance

WEBCAST

SOCIAL NETWORK
@cegedimgroup

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ANNEXES

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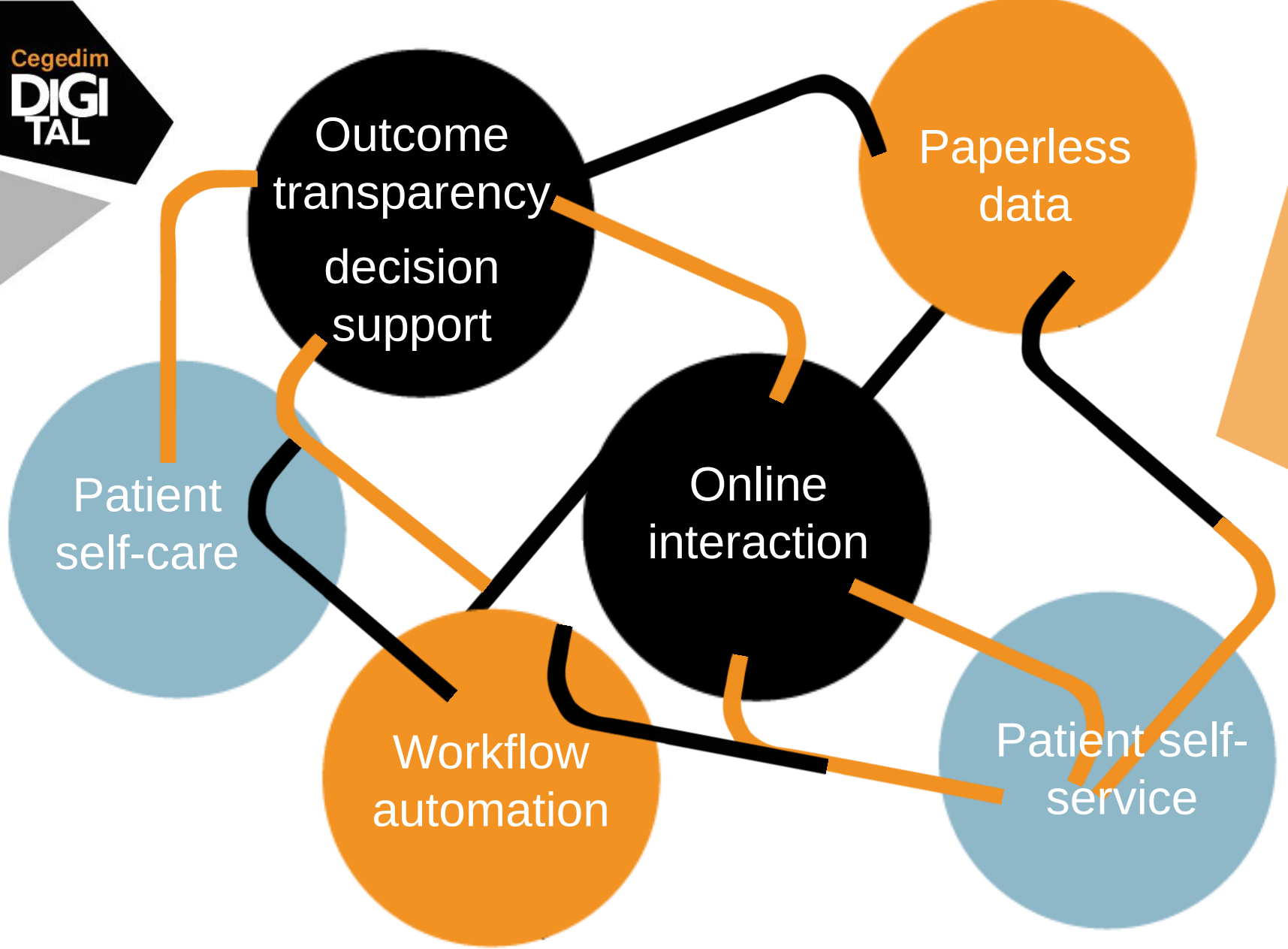
6 areas of improvement through digital transformation



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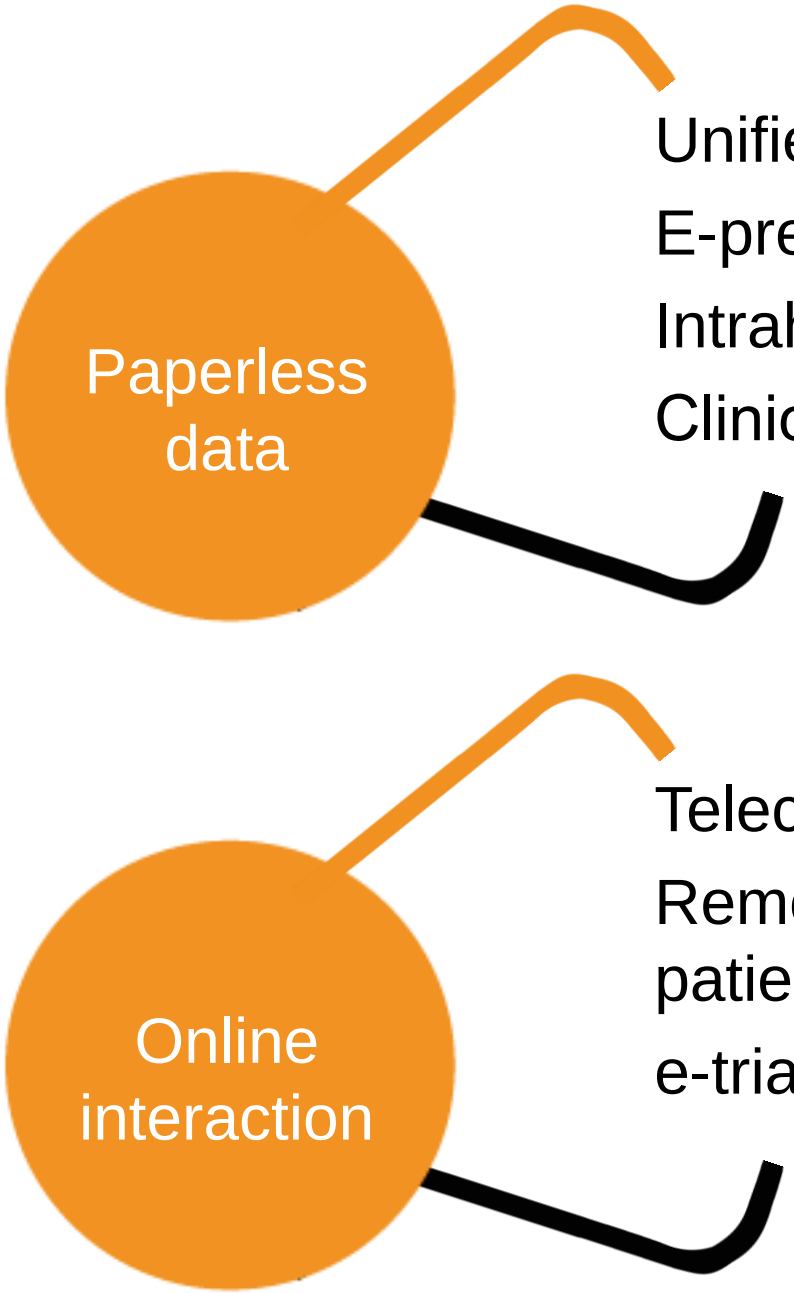

Unified electronic heath record/exchange

E-prescribing

Intrahospital staff communication

Clinicians' virtual assistants (AI)

Teleconsultation

Remote monitoring of chronic disease patients

e-triage

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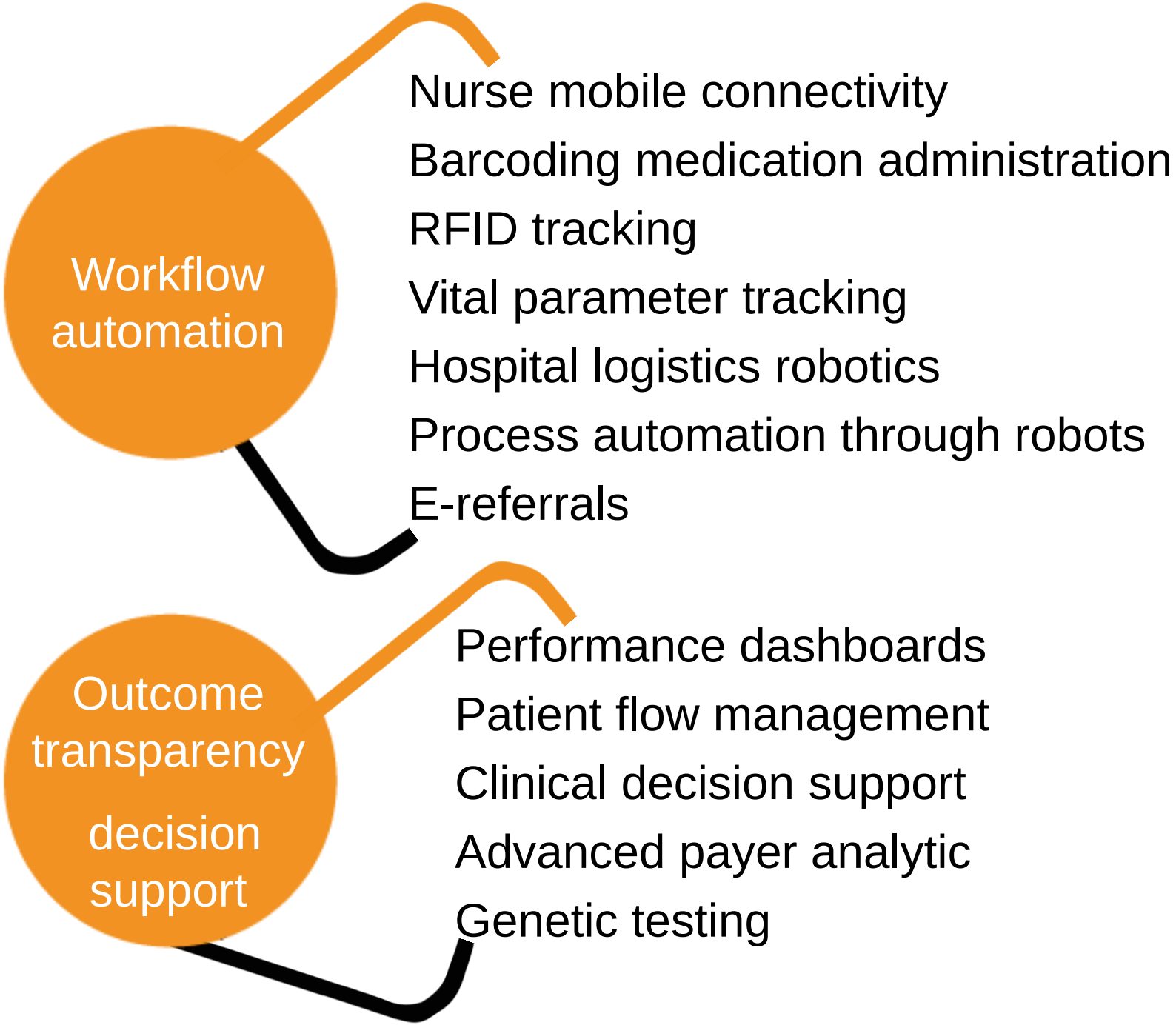

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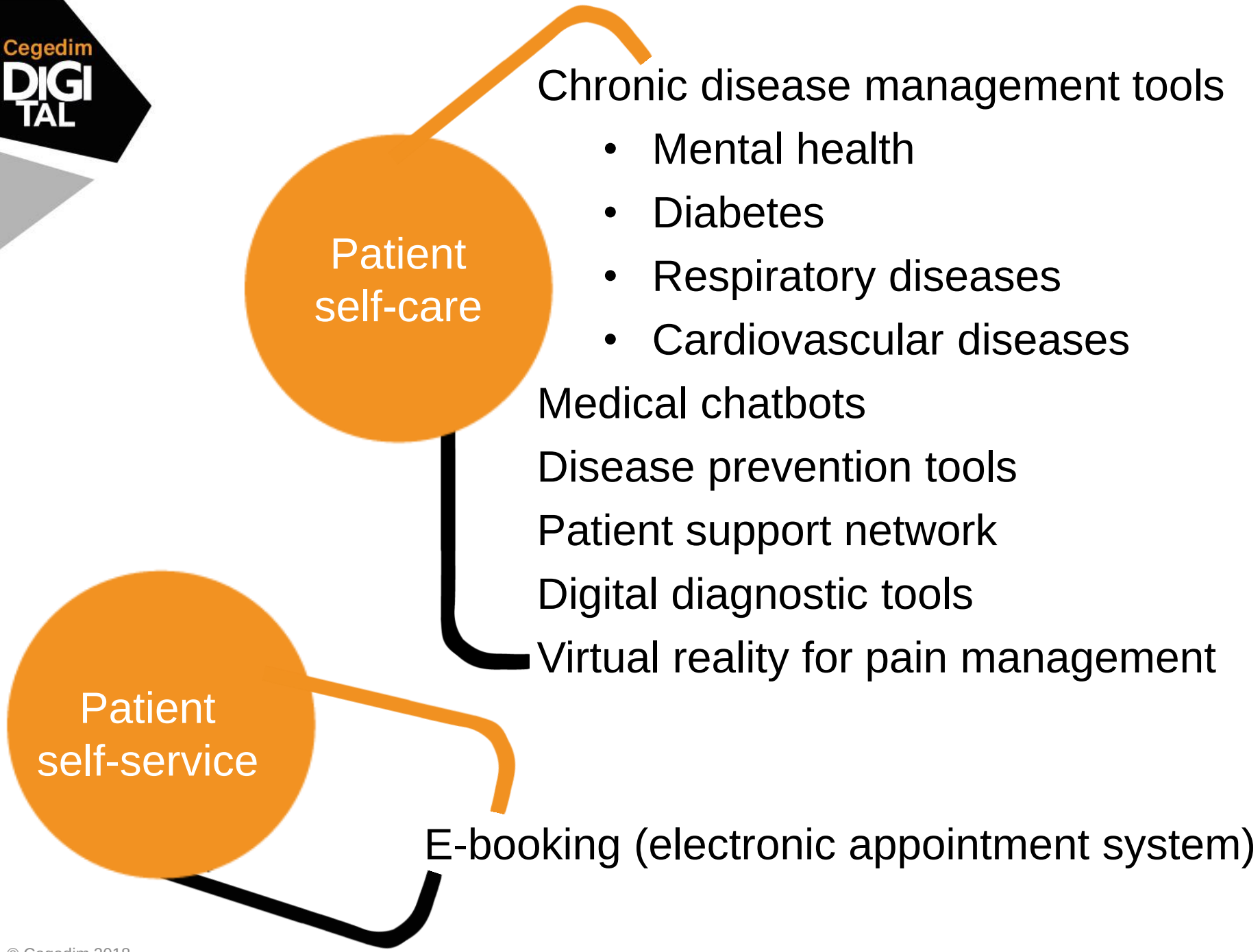

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THANK YOU

for your attention

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