



**PHILIPS**

Healthcare Informatics

## Selling the Healthcare Informatics portfolio Competitor knowledge book: **Visage Imaging**

March 2018 Version 1.0

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## Introduction

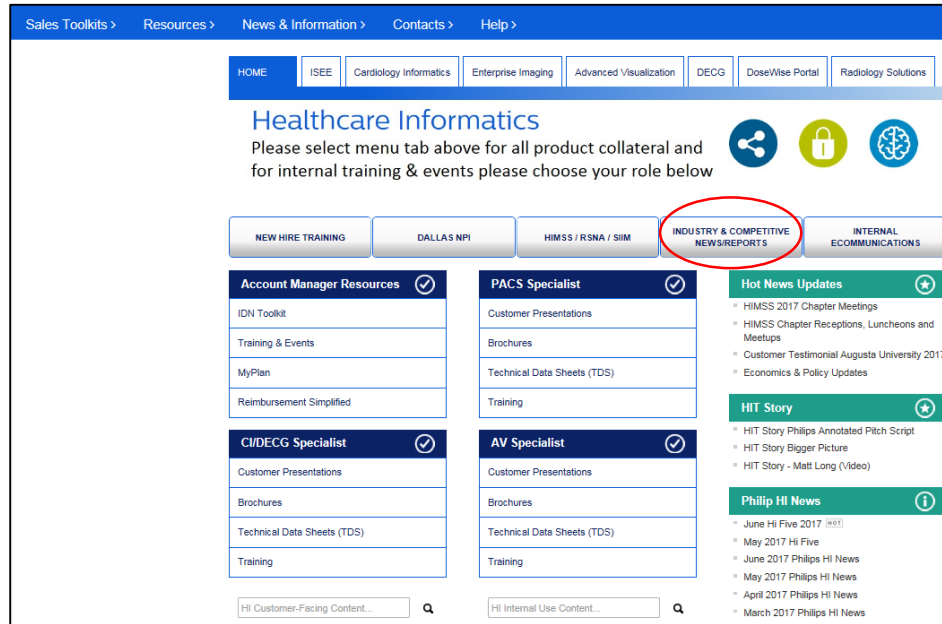
- This playbook is intended to be utilized by the North America Sales HI Account Managers in competitive positioning with account strategy development. **It is for internal use only and should not be distributed outside of Philips.**
- This playbook has been designed to provide relevant information so you can successfully promote and sell our solutions as well as understand and exploit areas of competitive weakness.
- This document is a living document and updates will be provided at least twice year or should important competitive dynamics or events occur.
- Actual field experiences provide true depth in understanding and we encourage all users of this material to provide additional insights to the field marketing team as they occur.
- Further details and additional information can be found on the Healthcare Informatics landing page of the Philips One Source portal - [Healthcare Informatics NA OneSource Landing Page](#)

Best regards and good selling,

**Your North America Field Marketing and Market Support Team**

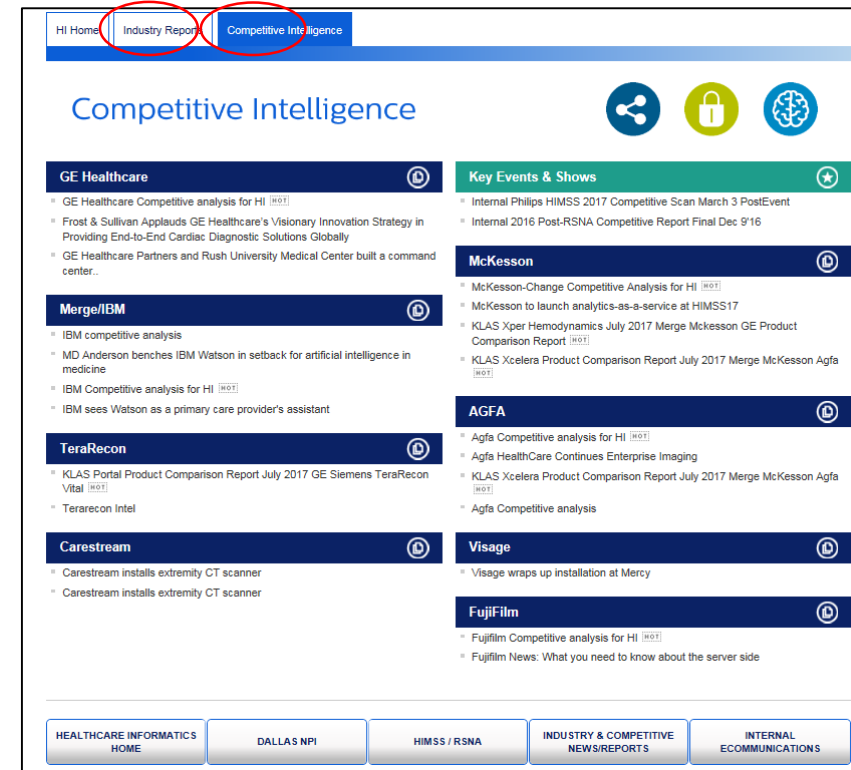
# Market and competitive intelligence

- The latest quarterly KLAS reports comparing Philips HI NA solutions vs. competitors can be found on the NA OneSource webpage for Healthcare Informatics
- For access or support needs contact: [hi.onesource@philips.com](mailto:hi.onesource@philips.com)



## Step 1

- Log into OneSource and navigate to the “Healthcare Informatics NA” landing page
- Then click on the “Industry and Competitive News & Reports” link



## Step 2

- Yearly KLAS, MD Buyline and other reports can be found in the “Industry Reports” section
- Click on “Competitive Intelligence” to see details by competitor including the latest copies of competitive attack/defend playbooks



Philips strategy:  
We aim to **capture growth**  
and **create value**

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March 2018

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# Executive Summary

## About the Company

- **Visage Imaging** is a global provider of enterprise imaging and advanced visualization solutions for diagnostic imaging.
- US-based Visage Imaging was acquired in 2009 by Australian based **Pro Medicus**. With 79 employees, Visage has nearly tripled its revenue in 4 years, gaining a prestigious partnership with the Mayo Clinic while maintaining total focus on its core RIS, PACS & enterprise imaging products.
- For year ended 30 June 2017, Net profit after tax was \$9.32M, 46.4% YoY. Margin also continues to grow, with profit growing faster than revenue, which was up 14.7% to \$31.62M. Strong performance in North America and Australia. 70% of revenues come from North America.

## Portfolio

Visage offers 3 solutions:

- ☞ **Visage 7** – an **Enterprise Viewer, Universal Viewer/Archive neutral viewer**, with tremendous speed, clinical capabilities and scales
- ☞ **Visage Ease Pro** – an FDA 510(k) cleared, native **iOS mobile application** that provides users the ability **to interpret all diagnostic imaging studies** (other than mammography) that are stored on a Visage 7 server.
- ☞ **Visage Ease** - A **native mobile application** that provides **users access to medical imaging results** that are stored on a Visage 7 server from any iOS device, including iPad, iPhone, and iTouch. Visage is not a medical devices and must not be used for diagnosis.

## Recent Deals

Since 2015, Visage has been successful in securing 6 large deals in the US (\$66.6M; 5-7 year term contracts). Customers include: UF Health; Allegheny Health Network; Mercy Health; FMOLHS; Mayo Clinic; and Yale New Haven Health.

## Visage Business model

When **clients contract with Visage they commit to a percentage of their examination volumes (transactions)** - usually between 70% to 90% of what they would expect to perform in any one year. Visage calls those the **minimums**, so whether they actually achieve those volumes or not **they pay us for those minimum number of transactions**. Once they go past these minimums, they pay Visage for each additional transaction so in effect the minimums provide a floor to the revenue we realize from each client. There is no ceiling.

## Position on Artificial Intelligence

Moving into AI ... not there yet, but showed works in progress @ Machine Learning Showcase (RSNA 2017) - see Artificial Intelligence Offering & Economics Explained by Visage Imaging's CEO Sam Hupert (December 2017)

## Industry Reports

Visage not included in KLAS, Definitive Healthcare or ITN databases.

# Executive Summary (Cont'd)

## What makes us stronger vis-à-vis Visage?

**Philips offers a much deeper and wider set of healthcare solutions.** We innovate across the health care continuum from supporting predictive and preventative care to connecting care in the home. The scope of our healthcare portfolio is greater than Visage's.

- **Illumeo.** Visage does not yet have an AI offering.
- **IntelliSpace Portal.** Visage AV offering is not as comprehensive as our ISP portfolio.
- **Philips DoseWise** solution. Visage does not offer a dose monitoring solution.
- **Our Cardio portfolio.** Unlike Philips, Visage does not play in this domain. We have a complete cardio portfolio including CVIS, ECG management, Epic integration, Cardiograph, Stress, Holter, Hemodynamic, Ultrasound, IGT, Cardio Advanced Visualization solutions.
- **Patient Monitoring, Oncology, Pathology, Population Health, CT, MR and US** solutions. Visage does not have such offerings.
- **The Philips team.** We have a large North American team. Customers value our people, technology and services. Philips has earned a strong reputation of taking care of its customers.

## How do we win against Visage?

- Grow the deal - make it bigger than radiology. Include Radiology Analytics, Advanced Mammography, Visible Light, Cardiology, Digital Pathology, Dosewise, etc
- Leverage Performance Bridge offering to differentiate ourselves
- Position Illumeo, as it is Zero Footprint just like Visage
- Philips scale is important, huge stable global healthcare company

## Final remarks

- Philips is positioned very well to support IDN/Regional Health System “core vendor strategy” across multiple service lines in the enterprise.
- Leverage the Philips Account Executive to collaborate on account needs, relationships, approach and strategy (especially at the CIO, CMIO and CFO levels).
- As does Visage, we must include Radiologists, Cardiologists, System Administrators, Technologists, IT Managers and department heads in the discussions.
- Ensure we position ourselves as a comprehensive Healthcare Informatics and Imaging leader.
- If needed, consider utilizing IntelliSpace Enterprise Edition to elevate our position and change the game especially at the C-level.

# About Visage Imaging

# About the company

**Visage Imaging** is a global provider of enterprise imaging and advanced visualization solutions for diagnostic imaging.

Wholly-owned subsidiary of [Pro Medicus Limited](#), with more than 30 years of experience in medical imaging.

## Brand Message

“Everything we do is about providing seamless, integrated solutions in imaging IT”

## Business Status

- Visage Imaging generated \$25.3M (USD) in revenue for the '16-'17 fiscal year
- 59% of the company's 102K shares are owned by its 2 founders
- Acquired in 2009 by Pro Medicus (AUS)

## Headquarters

Global – Richmond, Australia

US – San Diego, CA

(The company is incorporated in Australia under the name Pro Medicus, PME on the Australian stock exchange)

## Employees globally

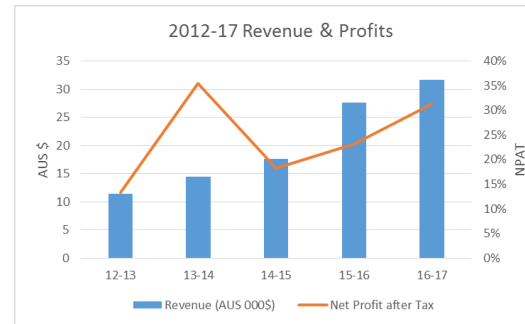
79

## Strategy

- Grow installed based with higher margins on new contracts, with focus on US
  - New contracts are 5-7 years, locking in revenue over the better part of a decade.
- Create new HIT products through R&D investments
- Expand beyond US & Australian markets
  - Only 6% of revenues come from Europe and 0% from Asia and developing markets, leaving room to grow in a \$4.5B global market.

## Financials

- Visage Imaging has steadily grown its revenue since its 2009 acquisition by **Pro Medicus**, moving from \$11.4M AUS to \$31.6M AUS from 2013-2017
- Over the same time frame Net Profits After Tax have grown from \$1.5M AUS to \$9.9M AUS
- Company valuation soared from under \$50M AUS in 2013 to more than \$600M AUS in 2016 before cooling off to \$500M this year.



**Takeaway** –Visage has nearly tripled its revenue in 4 years, gaining a prestigious partnership with the Mayo Clinic while maintaining total focus on its core RIS, PACS & enterprise imaging products.

## News

- Q2 2016 – Q1 2017 generated \$61M in contracts from Mayo Clinic, Mercy Health, and Australia's Primary Health, amongst others
- Obtained just shy of 5% of US market in Q2 2016

## Strengths

- A multi-year deal with Mayo Clinic is a prestigious beachhead from which to further Visage's inroads in the US market
- 3X revenue increase in just four years without sacrificing margin is strong evidence of product filling a market need without incurring excess costs
- Company valuation of 50+ P/E shows remarkable investor confidence in Visage's ability to grow
- Visage's CapEx is \$0
- Robust Enterprise Imaging Viewer
- Rapid implementation methodology; flexible team.

## Weaknesses

- Lack of presence in Asia and emerging markets likely means a long road ahead for establishing sales in these areas
- Having 79 employees likely limits sales' reach as well as R&D's investigative abilities
- Breadth of portfolio

## Opportunities

- If Visage is a truly differentiated PACS then the market opportunity is in the hundreds of millions with fairly minimal cost per unit to sell and service

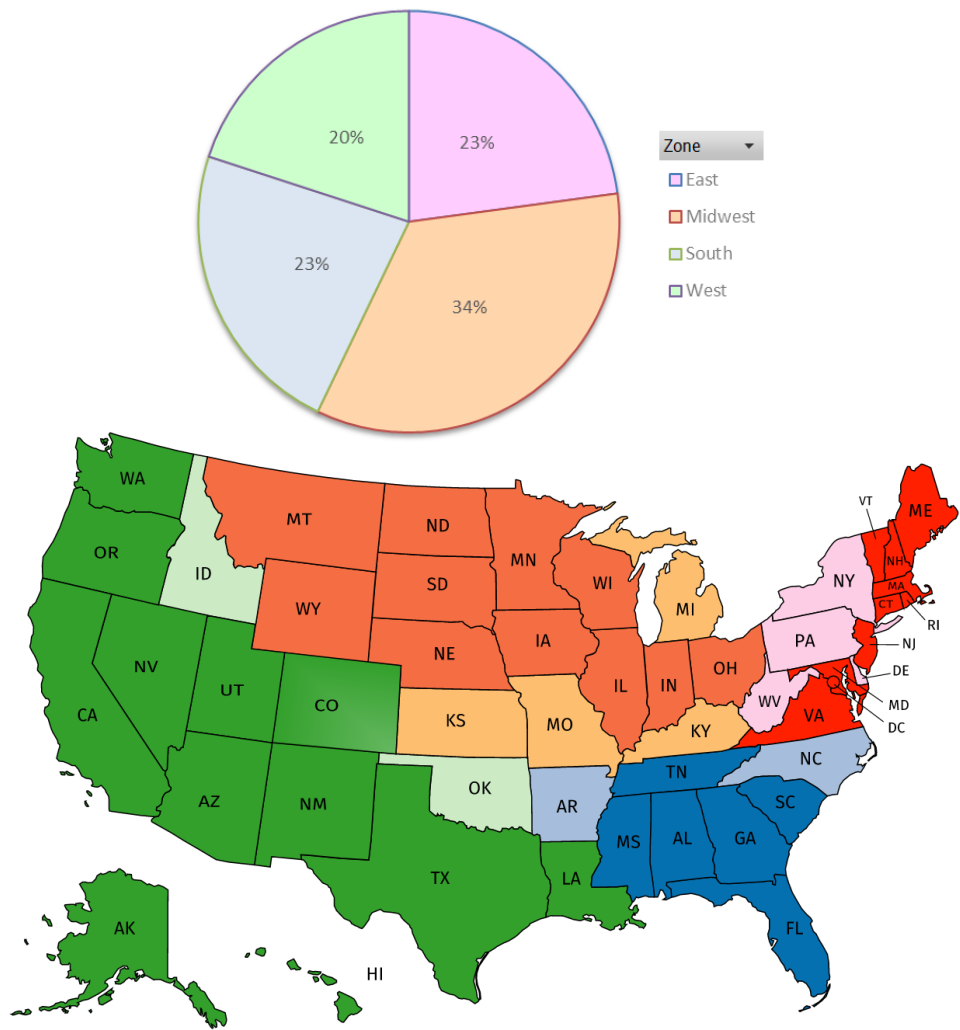
## Threats

- Minimal product diversification creates risk for a shift in market preference threatening company viability



# Install Base

35 customers in US



Organization	Organization Primary Service	State/Province	Zone	Year (Contract Year)
Beebe Healthcare	General Medical & Surgical	Delaware	East	
Mount St. Mary's Hospital	General Medical & Surgical	New York	East	2010
New York-Presbyterian/Queens	General Medical & Surgical	New York	East	
WellSpan York Hospital	Academic	Pennsylvania	East	
WellSpan Gettysburg Hospital	General Medical & Surgical	Pennsylvania	East	
WellSpan Ephrata Community Hospital	General Medical & Surgical	Pennsylvania	East	
WellSpan Surgery & Rehabilitation Hospital	Long Term Acute	Pennsylvania	East	2016
Cabell Huntington Hospital	Academic	West Virginia	East	2011
Mercy Hospital Fort Scott	General Medical & Surgical	Kansas	Midwest	2016
Mercy Hospital Columbus	Critical Access	Kansas	Midwest	2016
Taylor Regional Hospital	General Medical & Surgical	Kentucky	Midwest	
Appleton Municipal Hospital	Critical Access	Minnesota	Midwest	
Mercy Hospital Joplin	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital St. Louis	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital Jefferson	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital Washington	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital Lebanon	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital Springfield	General Medical & Surgical	Missouri	Midwest	2016
Mercy Hospital Carthage	Critical Access	Missouri	Midwest	2016
Mercy Hospital Lincoln	Critical Access	Missouri	Midwest	2016
Mercy Hospital Northwest Arkansas	General Medical & Surgical	Arkansas	South	2016
Mercy Hospital Fort Smith	General Medical & Surgical	Arkansas	South	2016
Mercy Hospital Paris	Critical Access	Arkansas	South	2016
Mercy Hospital Ozark	Critical Access	Arkansas	South	2016
Mercy Hospital Waldron	Critical Access	Arkansas	South	2016
Mercy Hospital Booneville	Critical Access	Arkansas	South	2016
Mercy Hospital Berryville	Critical Access	Arkansas	South	2016
Wayne UNC Health Care	General Medical & Surgical	North Carolina	South	
Benewah Community Hospital	Critical Access	Idaho	West	2010
Mercy Hospital El Reno	General Medical & Surgical	Oklahoma	West	2016
Mercy Hospital Oklahoma City	General Medical & Surgical	Oklahoma	West	2016
Mercy Hospital Ada	General Medical & Surgical	Oklahoma	West	2016
Mercy Hospital Ardmore	General Medical & Surgical	Oklahoma	West	2016
Mercy Hospital Kingfisher	Critical Access	Oklahoma	West	2016
Mercy Hospital Logan County	Critical Access	Oklahoma	West	2016

Source: HIMSS Analytics, March 2018

# Deals in the United States between 2015 & 2017

\$66M, 6 customers across 11 states

Year	Customer	Deal Value (USD)	Contract	Product(s)	# sites	Type of site	Purchasing model	Other
2015	UF Health	\$7.6M	7yrs	Visage 7	<b>2 health campuses – 4 hospitals</b>	University /Academic	Hybrid of capital and transaction-based US Shands opted for capital model UF Jacksonville opted for operational/transactional model.	18-24 months of analysis by team of technologists, physicists, radiologists and clinical providers
2015	Allegheny Health Network	\$8.7M	5yrs	Visage 7	<b>8 hospitals</b>	Large Health Network	Transaction-based model with potential upside	For diagnosis and clinical distribution of images to 2,800 physicians through EHR
2016	Mercy Health	\$16.7M	7yrs	Visage 7	<b>50 Mercy imaging locations, including 43 community and specialty hospitals across 4 states (Missouri, Arkansas, Oklahoma and Kansas)</b>	Large Health Network	Transaction-based model with potential upside  First deal as part of the ROi Master purchasing agreement	To be used for primary diagnoses, clinical distribution and access to radiology images via Mercy's electronic health record (EHR)  Processing 70,000 current and prior imaging exams daily => 25million studies/yr
2016	<b>Franciscan Missionaries of Our Lady Health System</b>	\$5.6M	7yrs	Visage 7	<b>5 acute care and specialty hospitals</b>	Largest Health System in Louisiana	Transaction licensing model  Second deal as part of the ROi master purchasing agreement	used for primary diagnoses, enterprise distribution and access to radiology images by <a href="#">over 2,000 physicians</a> via the system's <a href="#">new electronic health record (EHR)</a>
2016	Mayo Clinic	\$14M	6yrs	Visage 7			Transaction-based model with potential upside	
2017	Yale New Haven Health	\$14M	7yrs		<b>5 hospitals</b>	University /Academic	Transaction-based model with potential upside.	Visage 7 to be implemented across Yale's radiology departments and enterprise-wide for clinical access to imaging results.
<b>Total</b>		<b>\$66.6M</b>						



# Position on Artificial Intelligence

Explained by Visage Imaging's CEO Sam Hupert (December 2017)



## AI Offering

We think that AI is an emerging technology that will impact radiology in a number of areas and that we are very well positioned to benefit from the technology as it emerges.

Firstly, our platform is unique in that it is ideally suited to cater for both the **research** as well as **clinical/diagnostic** requirements of AI which we hope will make us the platform of choice. That's incredibly important particularly for these large institutions who need to analyze hundreds, if not thousands of examinations in order to refine or "teach" their algorithms, and being able to [use Visage as that platform](#), and then being able to [test it](#) and release it in [production](#) on the same platform we think makes us unique.

We are also looking at how AI can be used within Visage to further **improve radiologist's efficiency and clinical accuracy by automating some of the tasks** that are "semiautomatic" such as [measurements](#), [organ](#) and [lesion segmentation](#) and other areas that require radiologist intervention.

And finally, there's the **ability to integrate and run algorithms** that can assist with diagnostic accuracy. We don't think the we will be any one company that can produce all the algorithms, there may be hundreds so we have intentionally made Visage and [open platform that can integrated third party algorithms](#) as well as any we may produce giving the customer the choice of what works best for them.

So I think our approach is more than simply being able to integrate third party algorithms, we have adopted a more holistic approach to the use of AI.

## The Economics of AI offering

Whilst many are talking about AI as if it's "here and now", I think the reality is that is still a while away from being widely used in radiology but not too long – what I refer to as "over the horizon".

AI will play multiple roles for us. The first is within the product to make things even more automated and easier for a radiologist further setting us apart.

The second is to position Visage as the platform of choice to run and visualize the output of diagnostic algorithms. Use of those algorithms will most likely be a on a pay per use basis so clearly there would be some commercial/revenue sharing aspect if the algorithms we provided by a third party. There is also the possibility that we will develop our own algorithms or develop them in conjunction with some of our more research oriented clients. Again, [we envisage](#) these would be [licensed on a pay per use model](#). And, there are some other revenue models we are looking at.

In terms of funding, [it's early days so our current funding requirements are relatively small](#) and are being funded out of our current R&D budget. If our funding requirements in this are grow then we will look to allocate some of our cash reserves to these opportunities as part of a "special projects" program. [We are also open to partnership and/or acquisitions](#), so depending on the size of the opportunity, we would either use cash reserves or other funding mechanisms; all of which are available to us.

[Source: Open Briefing](#), Dec2017

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# Philips vs **Visage** Imaging

## A side-by-side comparison

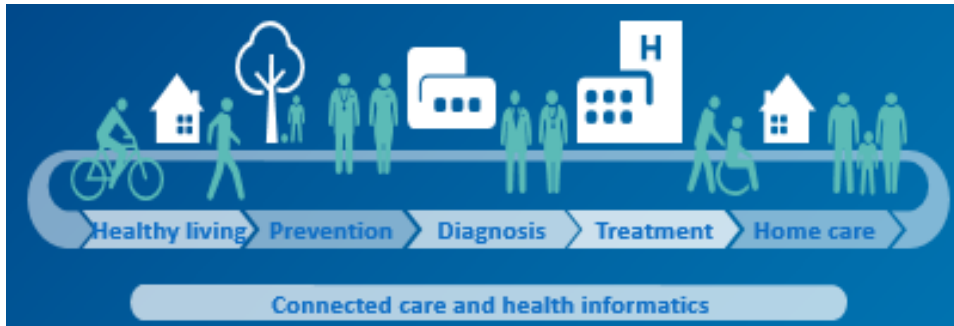
# Company Value Propositions side-by-side

## Philips

### Integrated Healthcare Informatics for Enhanced Patient Care

Every day, you're inundated with clinical data. Our healthcare informatics solutions have the power to transform this data into integrated information that can help guide patient care throughout your enterprise.

Our medical informatics solutions streamline management and analysis of patient data from imaging systems, patient monitors, and cardiac testing equipment, while also offering innovations that enhance clinical pathways and aid workflow. By connecting hospital information systems, you gain easy access to aggregated data across the patient care continuum, helping you to gain visibility into the overall health of a patient and proactively manage population health.



#### Intelligent

Automated workflows, advanced visualization and analytics, and adaptive intelligence that fosters stronger clinical collaboration



#### Connected

An interoperable and extensible healthcare informatics platform to enhance patient-centric care – from a trusted partner



#### Secure

Vigilance with the latest data security and patient privacy demands without compromising accessibility or your investment

## Visage Imaging

### Fast. Powerful. Enterprise Imaging.

The challenges you face are daunting. The good news is we're here to help with the power of server-side processing. Our diagnostic imaging solutions deliver fast access to multi-dimensional (2D, 3D, 4D) imagery, with powerful advanced visualization, across a single desktop providing a more natural reading workflow.

Visage Imaging enables physicians to visualize more information, faster, with innovative tools and technology. We're moving beyond the status quo, making the seemingly impossible, possible.





# Portfolio Comparison

- Executive Summary
- Company Info
- Portfolio
- EI Selling Strategies
- EI KLAS Insight
- CI Selling Strategies
- CI KLAS Insight
- AV Selling Strategies
- AV KLAS Insight
- ISEE Selling Strategies
- Competitor News
- Conclusion & Recommendations

		Philips	Visage Imaging
Managed Service (ISEE)	Radiology PACS	<a href="#">IntelliSpace PACS iVault</a> <a href="#">IntelliSpace PACS Anywhere</a> <a href="#">IntelliSpace PACS Federation</a> <a href="#">IntelliSpace PACS Mammography</a>	<a href="#">Visage 7</a> <a href="#">Visage Ease</a> <a href="#">Visage Ease Pro</a>
	Advanced Workflow Orchestration	<a href="#">Radiology Workspace Solution</a>	<a href="#">Visage 7</a>
	Radiology Information System		<a href="#">Visage RIS</a>
	Radiology Analytics	<a href="#">IntelliSpace Radiology Analytics</a>	unclear on what is available
	Enterprise Imaging/Visible Light	<a href="#">IntelliSpace Visible Capture</a>	unclear on what is available
	Vendor Neutral Archive	<a href="#">IntelliSpace Universal Data Manager</a>	<a href="#">Visage 7 Open Archive</a>
	Universal Viewer	Leverage roadmap via field marketing if this is a challenge	<a href="#">Visage 7</a>
	Image Exchange		
	Artificial Intelligence Offering	<a href="#">Illumeo</a>	<a href="#">AI innovations WIP</a> presented at 2017 RSNA Machine Learning Showcase. Scheduled to be released H1 2018.
	Cardiology CVIS	<a href="#">IntelliSpace Cardiovascular</a>	
	Cardiology Image Management System	<a href="#">Xcelera</a>	
	ECG Management	<a href="#">IntelliSpace ECG</a>	
	Hemodynamics	<a href="#">Xper Flex Cardio and Xper IM</a>	
	Advanced Visualization	<a href="#">IntelliSpace Portal</a>	<a href="#">Visage 7</a>
	Dose Management System	<a href="#">DoseWise</a> (Patient/staff rad safety offering). Work with field marketing for add'l info	
Core	Imaging Modalities (CT, MR, US, DR)	Align with DI and AE teams	
	Patient Monitoring	Align with AE and <a href="#">Patient Monitoring</a> teams	
Emerging Areas	Genomics	Work with field marketing for more information	
	Oncology	Emerging: Ask field marketing for roadmap help, if required	
	Pathology	<a href="#">IntelliSite Pathology Solution</a> Work with field marketing for more information or Digital Path sales team	
	Population Health	Align with the <a href="#">Philips Wellcentive</a> team	

## Visage RIS

Visage RIS is a comprehensive, enterprise-class and state-of-the-art radiology information system (RIS).

## Visage RIS/PACS

The complete solution for all of your organization's imaging needs, Visage RIS/PACS represents the pinnacle of intelligence, speed and scale, tailored for the needs of today whilst having the inherent flexibility to adapt for the future. [Visage RIS](#), working in tandem with [Visage 7](#), drives your imaging operations with precision, ensuring your organization is running fast and efficiently.

The **Visage® 7 Enterprise Imaging Platform** delivers amazingly fast server-side rendered images, streamed via an intelligent thin-client viewer. Radiologists and referring physicians have a customized, protocol-driven workflow to natively view multi-dimensional imagery using one powerful viewer. Visage Imaging is a proven leader in **Deconstructed PACS®** enabling the largest, most sophisticated imaging organizations to optimize their informatics investments, while also delivering the **most advanced enterprise viewer** available.

## Visage 7

Enterprise Viewer, Universal Viewer/Archive neutral viewer  
Offers tremendous speed, clinical capabilities and scales.

## Visage Ease Pro

FDA 510(k) cleared, native **iOS mobile application** that provides users the ability to interpret all diagnostic imaging studies (other than mammography) that are stored on a Visage 7 server.

## Visage Ease

Native mobile application that provides users access to medical imaging results that are stored on a Visage 7 server from any iOS device, including iPad, iPhone, and iTouch. Visage is not a medical devices and must not be used for diagnosis.

# Visage Imaging Portfolio Overview

# Visage Imaging Portfolio

## Enterprise Imaging

- **Visage RIS** – RIS Solution
- **Visage RIS/PACS** – RIS/PACS Solution
- **Visage 7** - Enterprise Imaging Platform (Universal Viewer and VNA)
- **Visage Ease** – mobile app to access imaging results
- **Visage Ease Pro** – mobile app to interpret diagnostic imaging studies

# Visage RIS

- It's time for Imaging 3.0, and **Visage RIS** is ready to take your imaging organization into the future. Imaging is becoming more clinically diverse, with deep sub-specialty capabilities and support of the latest imaging modalities propelling care forward.
- From a business perspective, Imaging continues to scale through regionally distributed business models built for growth and consolidation. Imaging must become increasingly efficient to maintain margins, therefore the importance of analytics and customizable, rules-driven workflow has never been more prominent.
- Sharing of data internal and external to the organization is a growing need. And the customers of Imaging, referrers and patients, deserve and demand the most attentive, responsive, focused-care that only the best Imaging IT platforms can support. Imaging organizations that recognize these realities will thrive in Imaging 3.0 and Visage RIS can take you there today.
- Visage RIS is a comprehensive, enterprise-class and state-of-the-art radiology information system (RIS).** The Visage RIS architecture leverages modern, open-source, standard-based technology such as: RESTful Web Services, stateless URL connectivity, integrated workflow engine, powerful rules engine, PostgreSQL database and CalDAV scheduling. As an enterprise-class RIS, Visage RIS includes the following expected capabilities: **Patient Registration; Billing** (e.g., Private, DVA, TAC, HIC Online, Bulk-billing and Eclipse); **Scheduling; Typing; HL7 Integration; Financial Reporting; PACS Integration; Digital Dictation and Voice Recognition Integration.**

Source: <http://www.promed.com.au/visage-ris/>



**Visage RIS** delivers the following core system attributes:

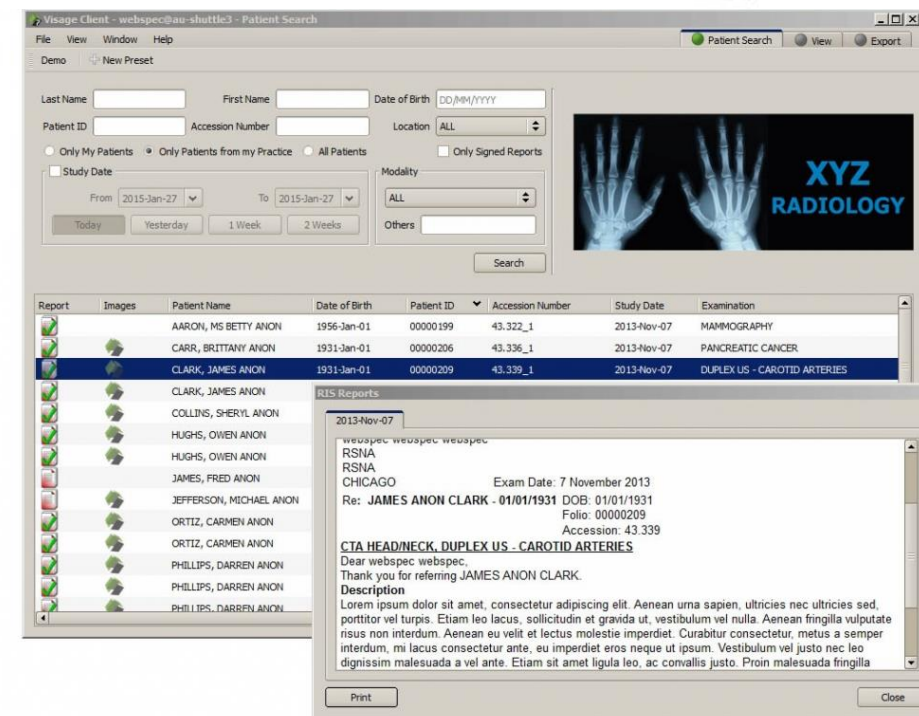
- Flexible:** Visage RIS uses an open source workflow engine that enables your organization to customize workflow to your explicit needs for today, and adapt as your needs change over time, without major software disruption. For instance, refined workflow to optimize outpatient and custom workflows (e.g., a worklist for Porters).
- Intelligent:** A powerful rules-engine is at the heart of Visage RIS, enabling for example, highly tailored rules for the creation of dynamic, user-specific (pre-filtered) reporting worklists that match the user's explicit requirements.
- Scalable:** Visage RIS has been architected to support community-based Imaging organizations scaling up to the world's most sophisticated, largest Imaging organisations, performing millions of annual exams, across hundreds of geographically dispersed locations.
- Fast:** Visage RIS uses rapid indexing, leveraging Web-like search technology. Even with the largest databases, Visage RIS responds quickly, again and again. And since Visage RIS supports both PC and Mac clients, and uses the latest in standards-based, rich-Internet application design, your users will have an intuitive usability experience enabling rapid system adoption.

# Visage RIS/PACS

- The complete solution for all of your organization's imaging needs, **Visage RIS/PACS** represents the pinnacle of intelligence, speed and scale, tailored for the needs of today whilst having the inherent flexibility to adapt for the future.
- Visage RIS**, working in tandem with **Visage 7**, drives your imaging operations with precision, ensuring your organization is running fast and efficiently.
- Patients are scheduled with ease, maximizing modality utilization, while providing a powerful communications platform connecting staff and keeping patient care as your foremost priority.
- Flexible workflow connects radiographers and radiologists ensuring interpretations are completed timely, with attentive productivity, by the most appropriately trained, available radiologists. Images are rapidly available for interpretation, regardless of the location of the reading radiologist, using the most sophisticated tools from a single, ultrafast clinical desktop. And when your radiologists and referrals are on the go, they quickly have access to their imaging results directly from their mobile with Visage Ease.

Providing fast access to images and reports is critically important for the best imaging organizations. But when combined with the most powerful viewer available, in a format that is equally convenient and clinically informative, now that is differentiation that will help increase referrals faster than the competition. With the **Visage 7 Referrer Gateway**, combined RIS/PACS information is presented to the referring physician, displaying a tailored view of their patients' images and reports, all branded with your organization's logo. The physician does not need to search for their images, because after the secure login, a list of "My Patients" is immediately displayed for review. With a single click, they can easily launch reports and imaging studies, from anywhere they have a network connection.

Source: <http://www.promed.com.au/visage-rispacs/>





# Visage 7

- Welcome to enterprise imaging nirvana. The **Visage 7 Enterprise Imaging Platform** enables imaging organisations to do things they have always wanted to do, but never could.
- **Visage 7** offers immediate differentiation for imaging organizations seeking to leapfrog the status quo of commoditized legacy PACS. Leading imaging practices have recognized that being digital like-everyone-else is no longer competitive, it's a road to nowhere, and they're demanding more.
- Whether described as an **enterprise viewer**, a **universal viewer** (UniViewer), or an **archive neutral viewer** (ANV®), Visage 7 delivers on the promise of Fast – Powerful – Enterprise Imaging. Visage 7 offers tremendous patented speed, robust clinical capabilities and scales to the needs of massive organisations. Developed exclusively by Pro Medicus' wholly-owned subsidiary, Visage Imaging, on a single code base, Visage 7 enables organisations to consolidate the capabilities of what has historically required multiple viewers, into a single customizable viewing platform.
- When legacy viewers and PACS are collapsed and simplified, value is delivered at all points along the imaging chain. **Radiologists** deliver differentiated, higher quality, more rapid interpretations freeing up availability for consultation. **Technologists** spend more time with patients, improving throughput and one-on-one care. **Referring physicians** have faster, more robust imaging results access. **IT leaders** can streamline their imaging infrastructure, resulting in significant savings, on a platform designed at the core for availability and growth.

Source: <http://www.promed.com.au/visage-7/>



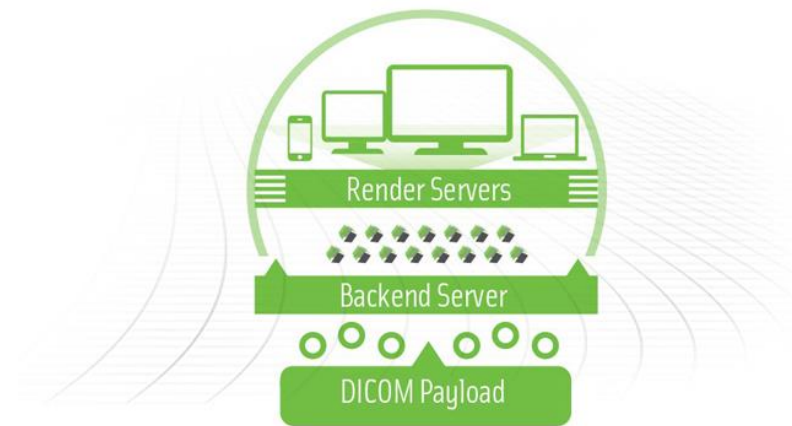
## Visage 7 Platform Differentiation:

- Multi-use case, one viewer: Diagnostic (e.g., Visage 7 has 510K clearance for diagnostic interpretation), Clinical, Advanced Visualization, EHR and Portal-image enablement, and Mobile.
- Server-side rendered images, adaptively streamed via an intelligent thin-client.
- DICOM is processed at the Visage 7 server, and never gets sent again for display.
- Identical thin-client functionality for PC and Mac, app-based, with zero plugins.
- Natively supports mobile access via Visage Ease for iOS devices.

# Visage 7 – Speed Claim

- In imaging, speed is critically important. When imaging is slow, workflow crawls and grinds to a halt. When speed thrives, it's instantly recognizable and truly magical. Welcome to the magic of Visage 7.
- Visage 7, **powered by server-side processing**, delivers amazing speed practically independent of modality type, the number of studies, or size of studies.
- Whether users connect local or remote, via the LAN or WAN, Visage 7 performance is largely equivalent and incredibly fast on connections as nominal as 6 Mbps.
- The **Visage 7 architecture** includes a **virtualisable Visage Backend Server** connected via patented streaming to one or multiple Visage Render Servers powered by commercially available GPUs.
- An intelligently managed **Visage 7 image cache** always ensures the current study and all related priors are available for viewing. A technically elegant solution, the full DICOM payload never leaves the Visage Backend Server and only the necessary lossless image pixels are adaptively streamed to requesting client devices.
- For example, performance is nearly comparable across any modality type, whether the study is a 2-3 image CR, a DBT study, or a multi-thousand slice CT with multiple priors. On the server-side, performance is incredibly fast.

Source: <http://www.promed.com.au/visage-7/speed/>



## Visage 7 Speed Differentiation:

- Patented, platform independent, ultrafast adaptive streaming via thin-client, down to consumer grade bandwidth of 6 Mbps, even over VPN and Citrix.
- Amazing performance is practically independent of modality type, as well as the number and size of studies.
- Current and prior images are never cached to local disk, and displayed nearly instantly, on-demand.
- Because Visage 7 leverages speed from server-side processing, outstanding performance at the client is essentially independent of RAM, local disk speed, local disk capacity, number of displays, number of cores, CPU speed, and OS.
- Ultrafast speed is also delivered to mobile users via Visage Ease.

# Visage 7 – Functionality Claim

- Visage 7 shatters all pre-conceived notions as to what's possible in a single, enterprise viewer.
- Visage 7 delivers user-customizable, multi-display, multi-dimensional, protocol-driven interpretation and referring physician access to all diagnostic imaging modalities, and non-DICOM too.
- Visage 7 allows radiologists and referring physicians to do more, enabling interpretation of multi-modality breast imaging studies and PET/CT lesion tracking, as well as native advanced visualization modules for neurology (brain perfusion), oncology, cardiology (cardiac CTA) and vessel analysis.
- **Visage 7 provides a more natural radiologist reading workflow**, delivering protocol-driven, server-side rendered 2D views, as well as MIP/MPR/Volume Rendering and advanced visualization, on a single desktop, including **on-the-fly reconstructions** of coronal and sagittal views from the original axial slices.
- And because Visage 7 offers a powerful viewer for all users, referring physicians benefit from a customized experience that is matched to their level of sophistication.



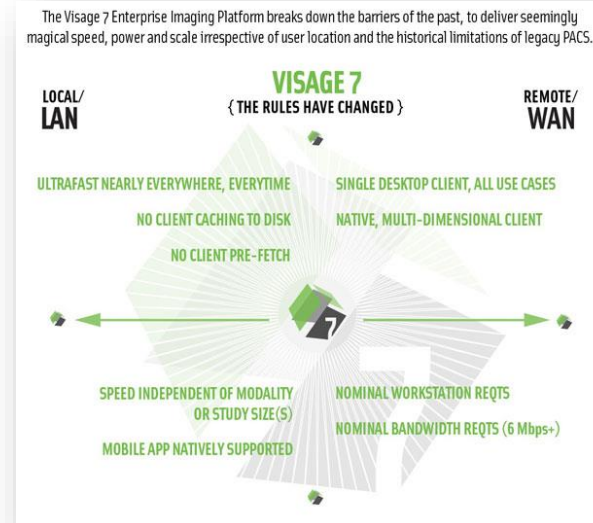
## Visage 7 Functionality Differentiation:

- One ultrafast, multi-dimensional viewer, for all diagnostic modalities (CR/DR, US, AWPBUS, NM, CT, MR, PET/CT, PET/MR, FFD, DBT, Dexa, XA, Cardiac Echo, Cardiac Cath). Non-DICOM images are also supported, including the following file types: \*.bmp, \*.jpg, \*.tiff, \*.pdf, and MPEG 4 HD videos.
- Visage 7 offers the following native functionality for advanced visualization: core multi-planar reconstruction, volume rendering, on-the-fly; core multi-modality display (i.e. multi-modality breast imaging MG, DBT, AWPBUS, Breast US, Breast MR); PET/CT Lesion Tracking; Cardiac CTA – Calcium Scoring, Functional Analysis, Coronary Artery Analysis; CTA/MRA Vessel Analysis; TAVR workflow; Brain Perfusion; dual echo, simultaneous display of EKG (stress/rest); automatic multi-modality registration; diffusion curves for breast and prostate imaging.
- Server-side pre-processing of multi-slice studies delivers incredible speed and on-the-fly reconstruction from axial images, all at the fingertips of the reading radiologist and authorized referring physician.
- Because reconstructions are delivered on-the-fly, this eliminates the delay of waiting for technologists to perform secondary captures at the operator console.
- Visage 7 supports a practically unlimited number of user levels to offer customized, sophisticated access for advanced referring physicians (e.g. orthopedic surgeons, oncologists, cardiologists), as well as simple, intuitive access for general practitioners.
- Visage 7 offers Save Sessions to share and collaborate studies at the exact desired study presentation state, with radiologists and referring physicians.
- Auto-prior rules are easily configured using Boolean logic, GUI-driven tools. And even if a prior is not displayed automatically, there is no time penalty to display an additional prior.
- Visage 7 supports the attachment and display of non-DICOM images and voice memos as additional series to existing Visage 7 studies.
- Visage 7 is a single code base, and does not use external or third party code for advanced capabilities.

# Visage 7 – Scalability Claim

- To thrive in today's challenging healthcare environment, Pro Medicus' wholly-owned subsidiary, Visage Imaging, has architected Visage 7 to support the largest healthcare enterprises, with massive scalability complementing native speed and power.
- Visage 7 is able to provide a single viewing platform for even the largest imaging organisations, including native mobile support with Visage Ease, eliminating the need for multiple PACS and countless imaging viewers that many imaging organisations struggle with today.
- Notably, many organisations are choosing to implement Visage 7 in tight integration with an enterprise workflow platform plus vendor neutral archive (VNA), or the Visage 7 Archive, to dramatically leapfrog their current imaging capabilities.
- Visage 7's neutral, symbiotic design is optimized to minimize legacy server-farms, as well as integrate with existing informatics infrastructure simplifying operations, maintenance, support, training, and administrative overhead.
- Yes, Visage 7 allows organisations to go big, and do the seemingly impossible: deliver cutting-edge enterprise-wide clinical functionality, while simultaneously reducing infrastructure demands and day-to-day overhead.

Source: <http://www.promed.com.au/visage-7/scalability/>



## Visage 7 Scalability Differentiation:

- Visage's innovative engineers have optimized how incoming studies are processed by Visage 7, to support tens of millions of annual studies, accommodating even the world's largest healthcare organisations.
- Large IT organisations appreciate Visage's flexibility for third-party bi-directional integration to Workflow, Reporting, VNA, RIS, PACS, as well as the most widely deployed EHRs.
- Visage 7 offers an architecture that supports centralized, decentralized, and/or hybrid architectures; as well as high-availability and disaster recovery solutions.
- Visage 7's decentralized architecture enables optimal local and enterprise-wide operations, even under limited network bandwidth, leveraging the federation of Visage 7 servers. Many distributed, geographically remote imaging center organisations choose this powerful federated model.
- Visage 7 enables a single enterprise-wide viewing platform where users can choose either Windows (PC) or Apple OS X (Mac), with the exact same user experience for diagnostic and clinical access.
- Visage 7 leverages an application-based model, with one-time client download and auto-update.
- Easing rollout and support, Visage 7 has zero plugins and does not run in a web browser.
- Visage 7 has the sophistication of enterprise-class IT systems, including support for virtualization; end user management via Active Directory, IWA and/or LDAP; as well as the foundation for flexible, robust security.
- Visage 7 supports protocol handler integration, enabling the launch of Visage 7 using a single command structure across PC, OS X and iOS platforms.

# Visage Ease

- Simple, fast access, on the go. Visage Ease\* is a **native mobile application** that provides users **access to medical imaging results that are stored on a Visage 7 server** from any **iOS device**, including iPad, iPhone, and iTouch.
- Because it's powered by ultrafast server-side processing, Visage Ease provides secure, fast access to imaging results via the convenience of your mobile device.

Note: Visage Ease requires access to a Visage 7 server. Without access to a Visage 7 server, image access is not possible.

\*Note: Visage Ease is not a medical device and must not be used for diagnosis.



Source: <http://www.promed.com.au/visage-ease/>



# Visage Ease Pro

- Simple, interpretation, on the go. **Visage Ease Pro is an FDA 510(k) cleared, native iOS mobile application** that provides users the ability to **interpret all diagnostic imaging studies** (other than mammography) that are **stored on a Visage 7 server**.
- Consistent with general FDA principles for mobile apps, mobile devices should only be used for diagnosis in situations where no full diagnostic workstation is available (and not for mammography).
- Diagnostic interpretation using Visage Ease Pro should also only be performed on iPads due to the available screen real estate, with a user alert displayed when Visage Ease Pro is used on the iPhone.
- Because it's powered by ultrafast server-side processing, Visage Ease Pro provides secure, fast access to even the largest multi-gigabyte sized studies via the convenience of your mobile device.

Note: Visage Ease Pro requires access to a Visage 7 server running 7.1.6 or later. Without access to a Visage 7 server, image access is not possible



Source: <http://www.promed.com.au/visage-ease/>

Selling against **Visage Imaging**

# Radiology Informatics – Defend strategy

**Visage 7** - Enterprise Imaging Platform (Universal Viewer)



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## Vendor's claim

**Speed** - In imaging, speed is critically important. When imaging is slow, workflow crawls and grinds to a halt. When speed thrives, it's instantly recognizable and truly magical. Welcome to the magic of Visage 7. Visage 7, powered by server-side processing, delivers amazing speed practically independent of modality type, the number of studies, or size of studies. Whether users connect local or remote, via the LAN or WAN, Visage 7 performance is largely equivalent and incredibly fast on connections as nominal as 6 Mbps.

The Visage 7 architecture includes a virtualizable Visage Backend Server connected via patented streaming to one or multiple Visage Render Servers powered by commercially available GPUs. An intelligently managed Visage 7 image cache always ensures the current study and all related priors are available for viewing. A technically elegant solution, the full DICOM payload never leaves the Visage Backend Server and only the necessary lossless image pixels are adaptively streamed to requesting client devices. For example, performance is nearly comparable across any modality type, whether the study is a 2-3 image CR, a DBT study, or a multi-thousand slice CT with multiple priors. On the server-side, performance is incredibly fast.

**Functionality** - Visage 7 shatters all pre-conceived notions as to what's possible in a single, enterprise viewer. Visage 7 delivers user-customizable, multi-display, multi-dimensional, protocol-driven interpretation and referring physician access to all diagnostic imaging modalities, and non-DICOM too. Visage 7 allows radiologists and referring physicians to do more, enabling interpretation of multi-modality breast imaging studies and PET/CT lesion tracking, as well as native advanced visualization modules for neurology (brain perfusion), oncology, cardiology (cardiac CTA) and vessel analysis.

Visage 7 provides a more natural radiologist reading workflow, delivering protocol-driven, server-side rendered 2D views, as well as MIP/MPR/Volume Rendering and advanced visualization, on a single desktop, including on-the-fly reconstructions of coronal and sagittal views from the original axial slices. And because Visage 7 offers a powerful viewer for all users, referring physicians benefit from a customized experience that is matched to their level of sophistication.

## Philips response

**Philips IntelliSpace PACS** leverages the patented iSyntax technology, providing just-in-time delivery of image data; this advanced technology delivers full fidelity and full-resolution medical images over existing hospital networks, making large infrastructure upgrades unnecessary. Philips iSyntax technology balances the workload across the entire network system – the server delivers just the required amount of data to utilize the client's image display, as the user interrogates the image, the server delivers additional data, just-in-time, to match the user interaction with the image.

The key difference is Visage using server-side rendering versus client-side rendering with IntelliSpace PACS. Visage may choose to poke at client-side renderings weakness to scale over a WAN. While IntelliSpace PACS has minimum WAN requirements, same with Visage, we have a number of high profile customers (Kaiser, MD Anderson, Nuvodia) who have radiologists reading from home over a variety of WAN connections.

Moreover, Server-side rendering offers trade-off between centralized administration and scalability; as such, it is not a clear advantage.

**Philips IntelliSpace PACS** is comprehensive enterprise imaging solution. It provides the necessary imaging tools for radiologist reading workflow, including embedded advanced visualization tools. While Visage offers a few advanced visualization modules, IntelliSpace PACS may be further enhanced by any of 70+ IntelliSpace Portal best in KLAS applications spanning multiple different clinical domains.

Visage only provides the viewer(s), and customers will need to purchase workflow orchestration separately, and from a different vendor. In contrast, our solution is a comprehensive end-to-end solution, which includes advanced workflow orchestration, based on a fundamental understanding of radiology workflow, helping customers achieve their goal of high quality patient care, while also delivering advanced efficiency tools—so that valuable time is spent solving diagnostics challenges, not navigating 3<sup>rd</sup> party workflow Software.

Our native solution also alerts the radiologists to unread exams, deliver metrics related to peer review, and monitor key service level agreements to deliver real-time workflow management that enhances efficiency

# Radiology Informatics – Defend strategy (cont’d)

**Visage 7** - Enterprise Imaging Platform (Universal Viewer)



Vendor’s claim	Philips response
<p><b>Scalability</b> - To thrive in today’s challenging healthcare environment, Visage has architected Visage 7 to support the largest healthcare enterprises, with massive scalability complementing native speed and power. Visage 7 is able to provide a single viewing platform for even the largest imaging organizations, including native mobile support with Visage Ease Pro and Visage Ease, eliminating the need for multiple PACS and countless imaging viewers that many imaging organizations struggle with today. Notably, many organizations are choosing to implement Visage 7 in tight integration with an enterprise workflow platform plus vendor neutral archive (VNA), or the Visage 7 Archive, to dramatically leapfrog their current imaging capabilities. Visage 7’s neutral, symbiotic design is optimized to minimize legacy server-farms, as well as integrate with existing informatics infrastructure simplifying operations, maintenance, support, training, and administrative overhead. Yes, Visage 7 allows organizations to go big, and do the seemingly impossible: deliver cutting-edge enterprise-wide clinical functionality, while simultaneously reducing infrastructure demands and day-to-day overhead.</p>	<p>Customers deploying Visage solutions need to procure and integrate several key components from disparate vendors (e.g. workflow orchestration, Cardiology Solution, Analytics, etc.).</p> <p>In contrast, Philips delivers a comprehensive Enterprise imaging platform, complementing the EMR, and addressing the enterprise imaging needs of the institution, including Radiology, Cardiology, Mammography, Visible Light, and more.</p> <p>We offer the clinical intelligence and workflow, scalability and performance of a traditional PACS along with the interoperability, standards based environment and universal image management of a VNA all in a secure environment</p>
<p><b>Open Archive</b> - Many institutions continue to be frustrated with inferior archiving solutions. The reality is most production archives, including legacy PACS archives and vendor neutral archives (VNA), lack adequate scalability, performance, interoperability, reliability, availability, data quality, and even the fundamental support of contemporary standards required for today’s enterprise-scale implementations.</p>	<p><b>Visage Open Archive</b> was recently launched in NA (mid 2017) and is an unproven solution, and does not have the installation footprint of Philips iVault and UDM as an entitlement upgrade.</p> <p>UDM supports Enterprise imaging including: DICOM and Non-DICOM, IS/PACS and Illumeo, third party PACS using WADO-RS, Extremely large image management (5 million studies/yr), CILM and Pre-fetch. UDM is scalable and exceptionally performant, with image access to all studies and image display on average of 3 seconds.</p>

[Source: Visage 7 Platform Differentiation](#)

# Radiology Informatics — Defend strategy

**Visage Ease** — Native mobile application for imaging results access



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## Vendor's claim

### Imaging Results Access

Care providers require intuitive imaging results, and Visage Ease delivers. Compared to x-ray film or patient CDs, the Visage 7 Enterprise Imaging Platform in combination with Visage Ease provides a much richer and convenient form of imaging results communication. Authorized users have access to imaging results, when and where they need it. Developed as a native app, Visage Ease imaging results are intuitively displayed in portrait or landscape mode, and are optimized whether viewing on iPad, iPhone or iTouch devices. Visage Ease enables the visualization of images, as well as the radiology report (if available), taking advantage of iOS's multi-touch gestures and Visage Ease image controls for optimal usability.

Mobility empowers by extending access to locations not historically accessible by imaging. Visage Ease enables authorized users (e.g., Radiologists, Referring Physicians, Administrators) to have access to imaging results, for example, at the patient bedside, in the department, in the exam room, at the imaging center, at the physician office, at home, or simply out and about. Users who have cellular or WiFi network accessibility on their laptops or MacBooks always have access to Visage 7, but the convenience of accessing imaging from iOS devices (iPad, iPhone, iTouch) breaks down location barriers never before possible in imaging.

In mobility, usability reigns supreme. Visage has taken special care to develop Visage Ease as a native iOS app. That means Visage Ease has been optimized exclusively for iOS devices, taking full advantage of multi-touch gestures, and the familiar form factor and user experience typical of iPads, iPhones, and iTouch devices. Visage Ease has been designed to provide a simple, optimal user experience, with gestures, controls, icons, and site navigation architected to leverage the strengths of iOS and provide an enjoyable, inherently familiar experience to users. Application familiarity lends itself to ease of use and long term usability, increasing end user adoption levels with zero to minimal need for end user training, end user documentation and/or end user mobile support.

## Philips response

**Philips IntelliSpace PACS** has built its brand on enterprise distribution of images and report, and we continue to innovate around the needs of the market.

**Philips IntelliSpace PACS Anywhere** provides a zero-footprint, HTML5 platform for securely transferring and viewing image data across different devices. Designed for web-viewing and mobile devices, manipulating standard DICOM images, as well as visible light images, is naturally intuitive. Caregivers across the organization can access images and diagnostic reports from their PC, MAC or mobile devices when and where it's needed.

**IntelliSpace PACS Anywhere** goes beyond imaging results distribution and review, and includes advanced communication and collaboration capabilities. Embedded communication capabilities foster collaboration and insight between technologists, radiologists, and clinicians, while mobility and workflow advancements help support patient interactions and decision-making on the go.

### Philips IntelliSpace PACS Anywhere:

- Provides patient information, images and reports to mobile users through the enterprise
- Supports advanced collaboration and workflow
- Requires little/no user training through simple User interface
- Zero footprint (no installation and no download of software)
- Platform independent (leverages industry standards to run on multiple devices)
- Secure exchange of patient information
- Designed to image-enable the EMR
- Support for clinical review (not for primary diagnosis or interpretation)
- Clinical review Exam consultations
- Discuss treatment plan with patients
- Review images on the way to surgery
- Review images while on call
- Support clinical decision making across the healthcare enterprise
- Display/manipulation of exams and reports
- Support for Visible Light Studies
- Workflow capabilities (Mail/Critical Findings)
- Run on IntelliSpace iVault, VNA or PACS from other vendors
- HTML5 Zero foot print technology
- Adaptable User Interface: runs on disparate form factor/devices/platforms
- Secure exchange of patient information
- Leverage iSyntax for performance and scalability



# Radiology Informatics — Defend strategy



**Visage Ease Pro™**— FDA 510(k) cleared, native iOS mobile application that provides users the ability to interpret all diagnostic imaging studies

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## Vendor's claim

### Interpretation

Simple, interpretation, on the go. Visage Ease Pro is an FDA 510(k) cleared, native iOS mobile application that provides users the ability to interpret all diagnostic imaging studies (other than mammography) that are stored on a Visage 7 server. Consistent with general FDA principles for mobile apps, mobile devices should only be used for diagnosis in situations where no full diagnostic workstation is available (and not for mammography). Diagnostic interpretation using Visage Ease Pro should also only be performed on iPads due to the available screen real estate, with a user alert displayed when Visage Ease Pro is used on the iPhone. Because it's powered by ultrafast server-side processing, Visage Ease Pro provides secure, fast access to even the largest multi-gigabyte sized studies via the convenience of your mobile device.

### Access

Mobility empowers by extending access to locations not historically accessible by imaging. Visage Ease Pro enables authorized users (e.g., Radiologists, Referring Physicians, Administrators) to have access to imaging results, for example, at the patient bedside, in the department, in the exam room, at the imaging center, at the physician office, at home, or simply out and about. Users who have cellular or WiFi network accessibility on their laptops or MacBooks always have access to Visage 7, but the convenience of accessing imaging from iOS devices (iPad, iPhone, iTouch) breaks down location barriers never before possible in imaging.

For example, **Visage Ease Pro** supports **app-to-app integration with EHR mobile apps**, enabling authorized users to launch patient images in Visage Ease Pro from the electronic health record, and then returning back to the mobile EHR app. The freedom of imaging access enables communication and collaboration between radiologists and referring physicians, tightening the circle of care without the limitation of prior physical boundaries.

### Usability

In mobility, usability reigns supreme. Visage has taken special care to develop Visage Ease Pro as a native iOS app. That means Visage Ease Pro has been optimized exclusively for iOS devices, taking full advantage of multi-touch gestures, and the familiar form factor and user experience typical of iPads, iPhones, and iTouch devices. Visage Ease Pro has been designed to provide a simple, optimal user experience, with gestures, controls, icons, and site navigation architected to leverage the strengths of iOS and provide an enjoyable, inherently familiar experience to users. Application familiarity lends itself to ease of use and long term usability, increasing end user adoption levels with zero to minimal need for end user training, end user documentation and/or end user mobile support.

Some innovative examples of **Visage Ease Pro** features that take advantage of the simplicity and familiarity of iOS, include support of **iOS Push Notifications**, **Image Attachment** and **Voice Memos**. In fact, each of the features of Visage Ease Pro, to include ease of **initial download and updates from the Apple iTunes App Store**, has been designed with optimal usability in mind, creating loyal users and fostering high radiologist and referring physician satisfaction.

## Philips response

**Philips does not offer diagnostic interpretation capability with an iOS application.** However, **IntelliSpace PACS Anywhere** provides a zero-footprint, HTML5 platform for securely transferring and viewing image data across different devices. Designed for web-viewing and mobile devices, manipulating standard DICOM images, as well as visible light images, is naturally intuitive. Caregivers across the organization can access images and diagnostic reports from their PC, MAC or mobile devices when and where it's needed.

**IntelliSpace PACS Anywhere** goes beyond imaging results distribution and review, and includes advanced communication and collaboration capabilities. Embedded communication capabilities foster collaboration and insight between technologists, radiologists, and clinicians, while mobility and workflow advancements help support patient interactions and decision-making on the go.

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IntelliSpace PACS Features	Advantages
<b>Full Service HIT vendor</b>	<p>Philips offers a much deeper and wider set of healthcare IT solutions, covering a wide array of patient images and data in a secure, standards-based environment:</p> <ul style="list-style-type: none"> <li>• Common viewing platform for enterprise imaging needs, including Radiology, Cardiology, Mammography, Visible Light, and more</li> <li>• Clinical intelligence and workflow, scalability, and performance of a traditional PACS along with the interoperability, standards-based environment, and universal image management of a VNA, all in a secure environment</li> </ul> <p>Visage is a niche player, focused on a sub component (mainly the viewer) of a Radiology PACS system.</p>
<b>Embedded Advanced workflow orchestration</b>	<p><b>Empowers radiologists</b> to manage their work more efficiently:</p> <ul style="list-style-type: none"> <li>• Empower your radiologists to meet specific clinical and business goals, and better serve the referring community</li> <li>• Reduce or even eliminate the need for (costly) third-party workflow orchestration solutions</li> </ul>
<b>Visible Light capture and management</b>	<p><b>Integral part of PACS platform:</b></p> <ul style="list-style-type: none"> <li>• Intelligent clinical workflow provides a seamless user experience and a single repository to manage virtually all your medical images across the enterprise</li> <li>• Improve security/privacy of personal information(access control, audit trail, etc.)</li> <li>• Mobile, software-based solution grows with your enterprise and enables collaboration</li> <li>• Image-enable the EMR</li> </ul>
<b>Clinical intelligent software, leveraging Illumeo with adaptive intelligence</b>	<p><b>Philips IntelliSpace PACS augments the skills of your clinicians, redefining how they currently interface with images:</b></p> <ul style="list-style-type: none"> <li>• Delivers a tailored workflow experience, as it adapts to the context and to the user preferences</li> <li>• Assist physicians with best practices to help standardize care</li> <li>• Produces a more meaningful, insight-rich output that can help physicians get to the right decision for their patients and improve care</li> <li>• Improves collaboration between departments within the hospital and with referring physicians</li> </ul>

# PACS - KLAS Insights

No KLAS data available for Visage Imaging in PACS Segment.

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### Detailed Breakdown of PACS Overall Scores

■ 85.0–100.0   
 ■ 80.0–84.9   
 ■ 70.0–79.9   
 ■ <70.0   
    Limited Data

Fully Rated in at Least One Area	Large Hospitals (>200 Beds)	Community Hospitals (1–200 Beds)	Imaging Centers	Validated Enterprise Image Offerings
Sectra	(n=20)	(n=17)	(n=19)	V†
Carestream	(n=15)	(n=16)	(n=6)	UV
INFINITT	(n=15)	(n=16)	(n=16)	V
Merge, an IBM Company, Merge PACS	(n=23)	(n=15)	(n=16)	IUV
Merge, an IBM Company, Unity PACS (DR Systems)	(n=15)	(n=17)	(n=16)	IUV
McKesson	(n=36)	(n=24)	(n=15)	V†
<b>Philips</b>	<b>(n=31)</b>	<b>(n=17)</b>	<b>(n=15)</b>	<b>V</b>
Fujifilm	(n=30)	(n=18)	(n=17)	V
Agfa HealthCare IMPAX†	(n=29)	(n=15)		IUV
GE Healthcare Centricity PACS-IW [NP]	(n=15)	(n=6)		IUV
GE Healthcare Centricity PACS	(n=31)	(n=15)	(n=7)	IUV
Community/Outpatient Vendors				
Avreo		(n=15)	(n=8)	–
CoActiv [R]			(n=8)	V†
Intelrad		(n=6)	(n=15)	–
Novarad	(n=6)	(n=24)	(n=15)	–
RadNet			(n=12)	–
Below Confidence				
Cerner	(n=12)			U
Siemens	(n=9)			–

– Insufficient or No Data  
 [NP] Not Primary  
 [R] Regional  
 † Validated in KLAS 2016 enterprise imaging report as offering this functionality  
 ‡ Legacy Product

### Large Hospitals (>200 Beds)—Overall Score

Market Average

### Large Hospital Customer Retention and Loyalty (>200 Beds)

■ Planning to Leave   
 ■ Considering Leaving   
 ■ Stuck—Would Leave if They Could

Source: KLAS Report: **PACS 2017 RECONSTRUCTING FOR THE FUTURE**

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IntelliSpace Cardiovascular Features	Advantages
Philips offers a <b>full portfolio of Cardiovascular</b> imaging and information management solutions.	<ul style="list-style-type: none"> <li>• Visage has the ability to display images for cardiology and also has some advanced imaging tools like Calcium scoring and TAVR workflows. Cardiologists require significantly more functionality than Visage can deliver.</li> <li>• IntelliSpace Cardiovascular is designed specifically for Cardiologists. Cardiologists need to have a single viewer that allows the evaluation of multiple modalities in specific formats using specific tools. For example, simultaneously viewing the stages of a Stress Echo, synchronized biplane x-rays, and a 12-lead ECG. IntelliSpace Cardiovascular also provides, within the viewers, gives direct access to the specialized tools needed for diagnosis and documentation. IntelliSpace Cardiovascular also is used for structured reporting. Structured reporting in IntelliSpace Cardiovascular builds a powerful database for Department Administrators and Research Scientists. Philips also offers a complete Hemodynamic monitoring and cathlab documentation solution, as well as an ECG Management system and portfolio of DECG solutions.</li> <li>• The Cardiology Timeline presents a patient’s complete cardiovascular history, graphically. This is important to cardiologists especially while reviewing structural heart cases. Planning a single case frequently requires the need to see Cardiac CT, 3D Echo, ECG, Cath Lab, and Nuclear Cardiology studies, all at the same time.</li> <li>• IntelliSpace Cardiovascular works in conjunction with the EMR and optimizes the long term storage of images with many deep archiving options. In IntelliSpace Cardiovascular, in a single view, the physician can see all of the patient reports, patient demographics, allergies, lab results, and images.</li> <li>• IntelliSpace Cardiovascular can also be integrated to exchange data and provide direct access to 3<sup>rd</sup> Party system via its Web API and 3rdParty API capabilities. The reporting environments also support the export of data to Medical Registries for Echo, Cath, and ECG.</li> </ul>
<b>Cardiovascular solutions that are vendor agnostic</b> to RAD PACS and Archive vendor	<ul style="list-style-type: none"> <li>• IntelliSpace Cardiovascular is a vendor agnostic Cardiology Image and Information Management System that can be offered regardless of the RAD PACS and/or Enterprise Imaging Vendor (including Visage)</li> <li>• IntelliSpace Cardiovascular utilizes industry standard interoperability and a broad range of available interfaces to allow for images and date sharing between 3<sup>rd</sup> Party systems.</li> <li>• Additionally IntelliSpace Cardiovascular features configurable context launching which allows for launching to and from 3<sup>rd</sup> Party applications directly into patient and/or study context.</li> </ul>

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IntelliSpace Cardiovascular Features	Advantages
<b>Single cardiovascular workspace</b> with immediate access to all relevant cardiovascular information	<ul style="list-style-type: none"> <li>Organize day with user centric layer by creating a customized worklist to filter information needed</li> <li>Access graphical study list within with in search and worklist applets</li> <li>Access patient information from a single workspace</li> <li>Complement your EMR</li> <li>Work with medical devices from a variety of vendors</li> <li>Zero-footprint technology; Accessible anytime, virtually anywhere</li> <li>Compare multi-modality images and/or documents side by side</li> <li>Launch directly into third-party applications for more information</li> </ul>
<b>Zero footprint workspace with web-based echo reporting</b> accessible anytime, virtually anywhere	<ul style="list-style-type: none"> <li>Web based echo reporting anytime, virtually</li> <li>Fulfills the need to analyze echo images and create and finalize echo reports remotely</li> <li>Provides diagnostic quality echo images, including the ability to perform measurements and calculations</li> <li>Generate a report using user configurable templates</li> <li>Zero Footprint reduces client deployment needs and costs and can allow access to application from anywhere</li> </ul>
<b>EMR Integration</b> - Launch from EMR into IntelliSpace Cardiovascular and from IntelliSpace Cardiovascular into EMR	<ul style="list-style-type: none"> <li>Vendor agnostic towards EMR's</li> <li>Launch directly from your EMR into IntelliSpace Cardiovascular</li> <li>Procedure/patient context –images and documents are automatically selected and displayed in the Image and Document Viewer applets</li> <li>Use the EMR/HIS interface to access IntelliSpace Cardiovascular when working in your EMR/HIS system</li> </ul>
<b>Launch into third-party applications from the ISCV workspace.</b>	<ul style="list-style-type: none"> <li>Through third-party applications customers have the flexibility to launch into third-party applications via a Uniform Resource Locator (URL) at system, patient, study, and series level</li> <li>Multiple URLs per modality provide flexibility to use multiple applications for one modality</li> <li>Easy access to third-party applications not in patient or study context</li> <li>Easy access to other applications such as Advanced Analytics, your scheduling system, or your ECG worklist</li> <li>Streamline workflow by having access to multiple third-party applications in patient context such as hospitals which use more than one EMR</li> </ul>



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IntelliSpace Cardiovascular Features	Advantages
<p><b>Advanced analytics</b> tool helps dig deeply into data from various clinical and administrative systems.</p>	<ul style="list-style-type: none"> <li>• Examine data across your patient population for trending purposes; Quickly identify trends to support improvement of hospital workflows; Uncover opportunities for enhancing procedural efficiency;</li> <li>• Use report templates for common reports</li> <li>• Drill down further into individual patient data across patient population</li> <li>• Access supply utilization and productivity and outcomes reporting</li> <li>• Use a single industry-standard Microsoft reporting services tool to access data stored by IntelliSpace Cardiovascular applications</li> <li>• Accessible via internet explorer or via the Web API</li> <li>• Distribute scheduled reports automatically</li> </ul>
<p><b>Diagnostic Guidance</b> supports reporting confidence and accuracy</p>	<ul style="list-style-type: none"> <li>• Operates during reporting to warn you of conflicts, errors, omissions, or patterns that would otherwise go unreported or mistakenly reported</li> <li>• Retrospective analysis to determine how often a given rule set is violated, which is useful in auditing situations as we as in establishing best practices</li> <li>• Create comprehensive reports that aid in confident and efficient decision-making when developing treatment plans</li> <li>• Helps you meet reporting standards and accreditation requirements the first time with confidence</li> </ul>

# Cardiology - KLAS Insights

No KLAS data available for Visage Imaging in Cardio Segment.

Date collected between Mar 2017 - Mar 2018

Vendor	Product	Overall Score	Annual Trend	Konfidence
Merge, an IBM Company	Merge Cardio	78.8	↓ -4%	✓✓
Segment Average		76.3		
Philips	Xcelera	75.4	↓ -4%	✓✓
Siemens	syngo Dynamics	73.8	↓ -1%	✓✓
McKesson	McKesson Cardiology	73.0	↓ -1%	✓✓
Fujifilm	Synapse Cardiovascular	73.0	↑ +1%	✓✓
LUMEDX	Apollo Advance	71.6	↓ -8%	✓

Limited Data\*  Filtered view: All

Date collected between Mar 2017 - Mar 2018

Vendor	Product	Overall Score	Konfidence
INFINITT	INFINITT Cardiology Suite *	89.5	⊘
Segment Average		76.3	
Digisonics	DigiView *	57.3	⊘

Source: KLAS Score in Cardiology, March 2018

Visage is not a player in the Cardiology segment.

# Advanced Visualization – Defend strategy

## Defend Strategy Takeaway

- KLAS does not recognize Visage Imaging as an Advanced Visualization player.
- There is limited AV product information available on the company website. According to a commercial video clip found on the company website, **Visage 7** appears to offer the following basic AV tools *supporting all Radiology and Cardiology Diagnostic Modalities* :
 

<ul style="list-style-type: none"> <li>• SPECT/CT Fusion</li> <li>• Perfusion for MR/CT</li> <li>• Cardiac Function</li> <li>• Electrocardiography w/EKG</li> <li>• 2-D Orthogonal</li> <li>• 3-D Volume rendering</li> <li>• 3-D Volume Rendering (VRT Diffuse)</li> <li>• 4-D (Multi-phase Analysis)</li> <li>• Minimum density Projection (MinIP)</li> <li>• Average density Projection (AVgIP)</li> <li>• Maximum density Projection (MIP)</li> </ul>	<ul style="list-style-type: none"> <li>• Density Projection (iMIP)</li> <li>• Thick MPR</li> <li>• Multi-planar reconstruction (Thin MPR)</li> <li>• Multi-modality breast imaging</li> <li>• Non-diagnostic/Non-DICOM</li> <li>• Native Advanced Visualization</li> <li>• Multi-modality Fusion</li> <li>• Multi-Volume Fusion</li> <li>• Multi-modality 2D Viewer</li> <li>• CT Vessel Analysis</li> <li>• CT Coronary Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• CT Cardiac Function Analysis</li> <li>• CT Brain Perfusion</li> <li>• CT Lung Nodule Analysis</li> <li>• CT Calcium Scoring</li> <li>• CT/MR Volume Analysis</li> <li>• Dynamic MR</li> <li>• Multi-Modality Registration</li> <li>• PET/CT Fusion, with SUV</li> <li>• PET/MR Fusion with SUV</li> </ul>
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- When facing Visage, you should **focus on the core vendor choice** that we can offer as Philips:
  - One Scalable and evolving solution (70+ clinical applications) that can depend on to optimize and standardize workflow (#1 in KLAS)
  - One unifying vision
  - One enterprise license set
  - One uniform training program
  - One support contract and team
  - One managed service solution
  - One secured solution to manage
  - One platform to master

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IntelliSpace Portal Features	Advantages
<b>One integrated solution</b>	<ul style="list-style-type: none"> <li>• Tight integration with IntelliSpace Cardiology/Radiology PACS for more streamlined reading. <ul style="list-style-type: none"> <li>○ Single Sign On</li> <li>○ Smart Patient and study context awareness</li> <li>○ Study Notification</li> <li>○ Smart 3D bookmarks</li> </ul> </li> <li>• Task-guidance workflow and powerful “zero-click” preprocessing and automated pre-fetch capabilities for ease of use and throughput.</li> <li>• Client/server architecture allows access from anywhere in the network, even over VPN</li> <li>• Single primary reading suite serves multiple imaging disciplines</li> <li>• User-friendly timeline concept consistently adopted by all clients</li> <li>• Collaborative tools to help build stronger professional relationships, especially with general surgeons, emergency physicians, oncologists, cardiologists and other referring physicians.</li> <li>• Compliance with the latest data security and privacy demands without compromising accessibility.</li> </ul>
<b>An integrated workflow to empower clinicians, helping reduce variability and increase diagnostic confidence</b>	<ul style="list-style-type: none"> <li>• Comprehensive set of clinical applications (+70) supporting diagnosis and clinical workflow in cardiology, neurology, oncology, vascular and surgery</li> <li>• IntelliSpace Portal provides solutions for the most difficult cases</li> <li>• IntelliSpace Portal provide Clinical Decision Support for difficult cases</li> <li>• Auto-segmentation and measurement tools to improve precision and consistency</li> <li>• 3D viewing tools and automatic segmentations and key image management allow for easy analysis and reporting</li> <li>• Deliver the latest clinical tools and enhancements with annual heartbeat</li> <li>• KnowledgeScape real-time learning tool</li> <li>• 3D printing capabilities to be able to personalize pre-surgical planning</li> <li>• Machine learning capabilities: ISP automatically adjusts pre-processing rules to physician patters</li> <li>• Fast image transfer, removal of non-target anatomy, user configurable layouts help minimize diagnostic variance and reduce time to results, with up to 77% time savings in some cases</li> </ul>
<b>One partner vendor</b>	<ul style="list-style-type: none"> <li>• One efficient and scalable solution</li> <li>• One unifying vision</li> <li>• One enterprise license set</li> <li>• One uniform training program</li> <li>• One support contract &amp; team</li> <li>• One managed service solution</li> <li>• One secured solution to manage</li> <li>• One platform to master</li> </ul>

# Advanced Visualization - KLAS Insights

No KLAS data available for Visage Imaging in AV Segment.

Vendor	Product	Overall Score	Annual Trend	Konfidence
Philips	IntelliSpace Portal	83.0	↓ -2%	✓
Vital	VitreAdvanced	82.6	↓ -4%	✓
TeraRecon	Aquarius iNTuition Enterprise	81.4	↓ -7%	✓
Segment Average		80.1		

Limited Data\* Filtered view: All

Data collected between Mar 2017 - Mar 2018

Vendor	Product	Overall Score	Konfidence
Segment Average		80.1	
Siemens	syngo.via *	76.4	✗
GE Healthcare	AW Server *	73.0	✗

## IntelliSpace Portal



Source: KLAS Report: Advanced Visualization 2017

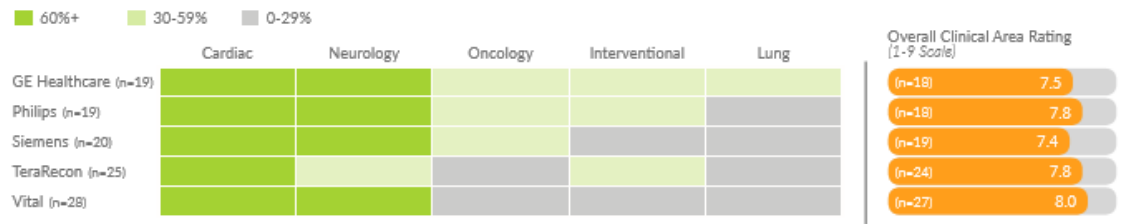
Although Visage Imaging provides a number of basic Advanced Visualization applications, it is not considered a key player in the AV segment.

Healthcare organizations continue to expand and deepen their use of advanced visualization (AV) software, and the majority find they must rely on multiple vendors' products to get the job done. Though providers are whittling down the number of AV systems used within any one organization, consolidation onto one platform across all clinical areas is not yet a reality. A recent KLAS report targeted providers with a server-based, enterprise-wide approach to advanced visualization to discover the depth of use and functionality across the most common clinical areas, along with which vendors are being considered as providers expand their use of AV technology.

Key findings include:

- The GE Healthcare and Philips systems are the AV solutions most widely adopted across clinical areas.
- Few Siemens customers report plans to expand their use of Siemens' AV solution due to product and development concerns, along with high contracting costs.
- Providers reported TeraRecon and Vital to be especially helpful during initial training.

### DEPTH OF USE





# IntelliSpace Enterprise Edition – Attack strategy

IntelliSpace Enterprise Edition, a highly performing, secure and scalable healthcare informatics platform, that enables health systems to manage the growth and cost of their clinical enterprise with a managed service and pay-per-use model.

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## Why consider ISEE? What are the advantages?

In a rapidly consolidating industry, you need reliable partners deeply experienced in 3 critical areas: electronic medical records, enterprise resource planning, and clinical informatics; partners that complement one another and are truly in it with you, ensuring that your solutions are fully utilized, your risks minimized, and your investments maximized.

With IntelliSpace Enterprise Edition, Philips can:

- 1. Be a true partner to you as your needs evolve.** We augment your EMR investment, providing deep clinical workflow capabilities, a single point of integration to your EMR, and a dedicated resource to help plan solution upgrades and other transformations.
- 2. Lower your risk and the upfront investment required.** With security and obsolescence protection, performance and uptime guarantee, and a transparent total cost of ownership, you can redirect resources to your other important initiatives as well.
- 3. Help you scale your solution as your enterprise grows.** Our interoperability solutions empower information flow within and between hospitals and other care settings, support standards-based integration, and enable universal data management across clinical domains.

### Predictability and Shared Risk:

- One point of contact—a support manager dedicated to your enterprise
- Our guarantee of 99.99% uptime across all solutions included in ISEE—made possible by our continuous remote monitoring. We're in this with you, sharing the risk to make it happen
- One convenient support number for you to call if something needs attention
- One place for all the latest software updates and the latest security patches
- One contract that clearly explains the terms and conditions across the ISEE solutions

**Experience:** IntelliSpace Enterprise Edition builds on and leverages the success of Philips' PACS managed service model. With nearly a billion radiology studies and 23 petabytes under management, Philips has decades of experience supporting thousands of hospitals across the globe with its PACS radiology workflow management applications

### Key Applications

Configured as a scalable and modular solutions platform, the initial launch of the secure, connected and intelligent IntelliSpace Enterprise Edition offers a harmonized managed service solution for the following applications:

[IntelliSpace PACS](#) – Enables physicians to more efficiently manage their work without compromise, through Connected images and information, secured patient data, and intelligent work flow;

[IntelliSpace Portal](#) – Advanced visual analytics to support complex interpretations across many clinical disciplines, including cardiology, oncology and neurology. Integrates with both IntelliSpace PACS and IntelliSpace Cardiovascular to deliver a seamless workflow experience for radiologists and cardiologists;

[IntelliSpace Universal Data Manager](#) – a scalable, secure, interoperable data management solution that supports healthcare enterprises in organizing large data sets, including millions of images and other data from multiple sources, and quickly delivering them to virtually any clinician throughout their health network;

[Illumeo with adaptive intelligence](#) – a new paradigm of clinically intelligent software that augments the skills of clinicians and redefines how they currently interface with images. Designed to empower radiologists and work for them, it provides the technology and tools that enhance their expertise and efficiency – all within a single workspace;

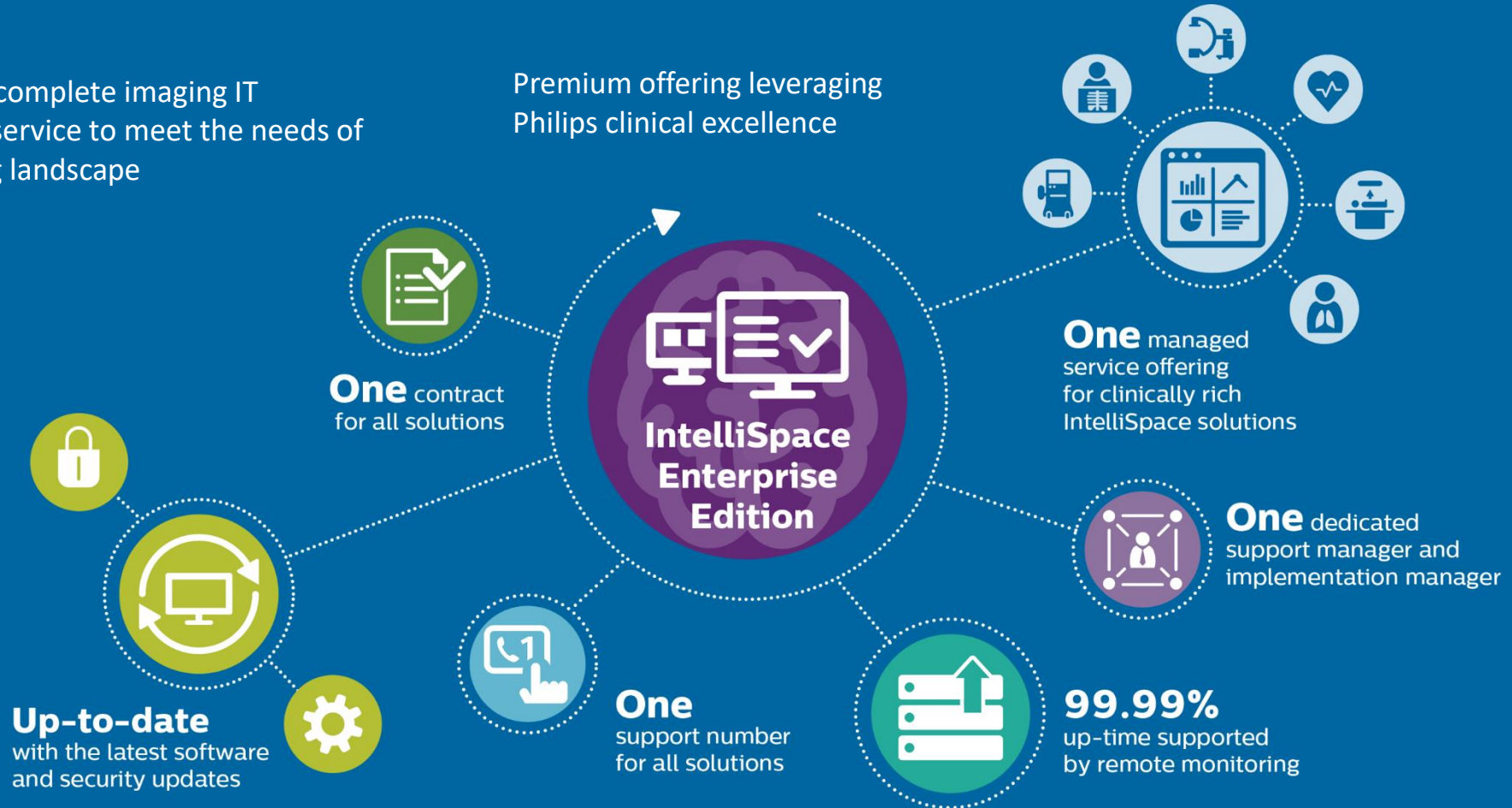
[IntelliSpace Cardiovascular](#) – Provides access to advanced cardiovascular informatics applications, brings multi-modality images and clinical tools together in a single workspace for integrated clinical decision support. It seamlessly integrates with [IntelliSpace ECG](#) and the Philips [Xper Information Management](#) cath lab workflow solution;

[Philips DoseWise](#) – Helps health systems manage patient and staff radiation exposure with a comprehensive suite of tools that collect, measure, analyze, and report dose exposure across departments and train care professionals in realizing a low-dose culture insights.

# IntelliSpace Enterprise Edition – Attack strategy

A unique, complete imaging IT managed service to meet the needs of a changing landscape

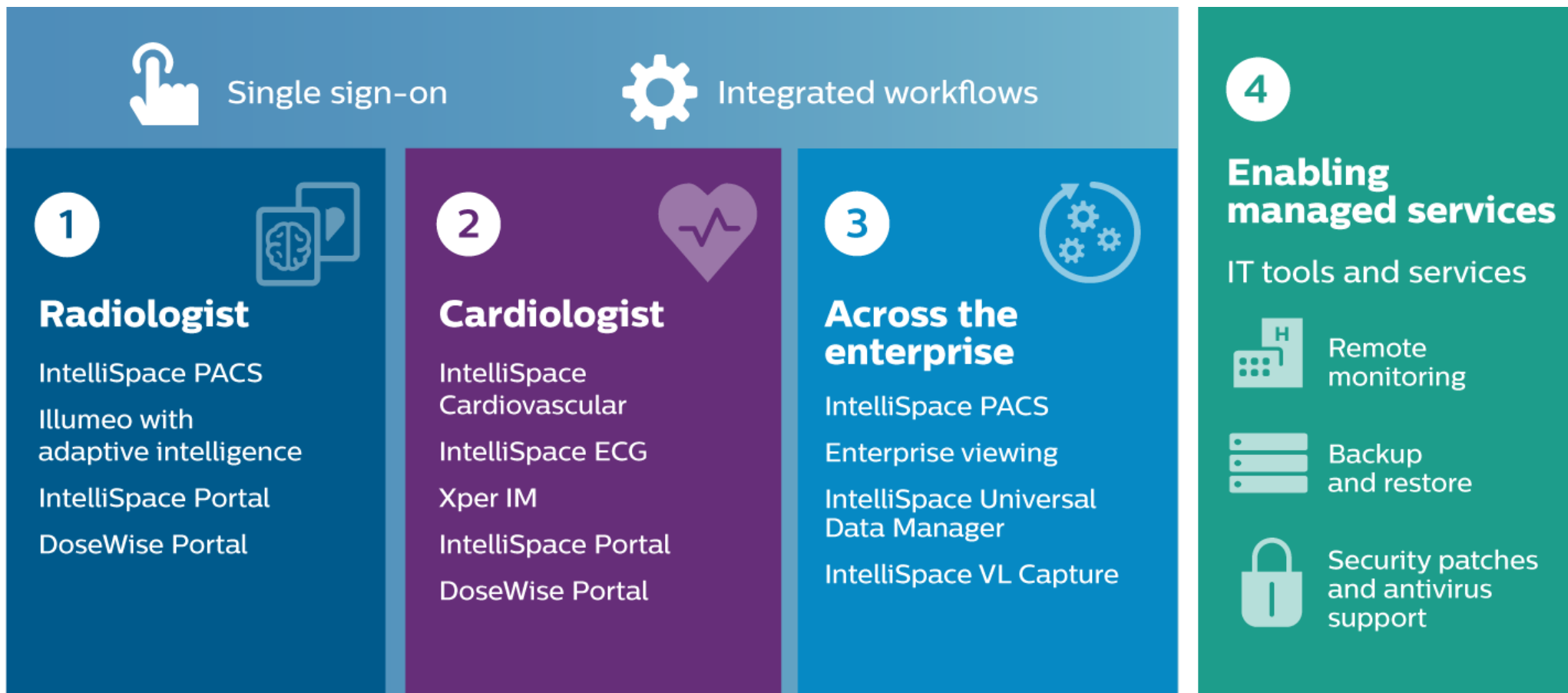
Premium offering leveraging Philips clinical excellence



Aggregating and interfacing across the enterprise

# IntelliSpace Enterprise Edition – Attack strategy

Most competitors offer “best of suite” enterprise imaging capabilities for multi-ology viewing, VNA, advanced visualization, and integrated workflow. IntelliSpace Enterprise Edition offers these as one managed service enabling you to effectively manage the expanse and expense of your clinical enterprise.



# IntelliSpace Enterprise Edition

## Service Delivery Comparison

We take responsibility for tasks that keep customers focused on strategy, patients, and competition in their market

Value elements	Traditional model	ISEE model
<b>Hardware</b>	Cost optimized for short term; lower flexibility	Cost optimized for longer term (TCO focus)
<b>Backup and recovery</b>	Backup and recovery needs to be setup by the customer for each product	Full data backup to recover from fatal crashes
<b>Proactive infrastructure monitoring and problem resolution</b>	Infrastructure monitoring customer responsibility	Centralized remote monitoring of HW infrastructure to proactively identify and fix issues
<b>Updating of antivirus and security patches</b>	Anti-virus and security patches list provided: customer responsible for ensuring that systems are up to date	Philips takes the responsibility of keeping system updated regularly
<b>Domain management and SSO</b>	Domain management is customer responsibility	Philips manages domain for all products to enable full SSO capabilities
<b>Uptime guarantee (shared risk)</b>	No uptime guarantees	99.99% uptime guarantees ensure risk-sharing and proactive support
<b>Contract setup</b>	Different contracts for different products; difficult to scale	Fully harmonized contracts, making scalability (up and out) extremely easy
<b>Post-sales SoW experience</b>	Product-centric SoWs	Solution-centric SoW; fully harmonized across products
<b>Project implementation</b>	Project teams for each product	Single-solution implementation team
<b>Service delivery: Call Center setup</b>	Optimized for product support: lower customer intimacy, product-centric intimacy	Optimized for solutions support: higher customer intimacy, dedicated TSE per customer; cross-product support
<b>Service delivery: support process to resolution</b>	Support process to resolution designed at a product level; SLAs and response times across products could differ	One support team for customer, with full ownership for closure

[IntelliSpace Enterprise Edition landing page in One Source](#)

# Visage Imaging Deals and Product Announcements

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**University of Florida**  
(Apr2015)

**Allegheny Health Network**  
(Sep2015)

**Large German Hospital**  
(Nov2015)

**Mercy Health**  
Visage 7  
(April16)

**FMOLHS**  
(April16)

**Mayo Clinic**  
(Jul2016)

**Visage 7.1.10 Now Available**  
(Feb2017)

**Mercy Go-Live**  
(Mar2017)

**Introducing Visage 7 Open Archive**  
(May 2017)

**Key Mobile Enhancements Released for Visage Ease**  
(Jul2017)

**Yale New Haven Health**  
(Nov2017)

**Visage Speeds ahead with AI**  
(Nov2017)

**Visage releases 7.1.11 of Enterprise Imaging Platform**  
(Feb2018)

**UF Health** to use **Visage 7** technology for primary diagnosis and clinical distribution of medical images

**Seven-year deal**, with base value to PME of **A\$9.5 million**

Significant win at prestigious university/academic institution

**Hybrid of capital** and transaction-based models with potential upside

**Allegheny Health Network (AHN)** to use Pro Medicus' **Visage 7** technology for primary diagnoses and clinical distribution of medical images

**Five-year deal** with base value to PME in excess of **A\$11 million**

AHN is a subsidiary of Highmark Health, which is Blue Cross Blue Shield-affiliated

The Highmark Health enterprise is the 3<sup>rd</sup> largest health care delivery & financing system in America

Transaction-based model with potential upside

**Large German government hospital** to use **Visage 7** technology throughout its' diagnostic imaging facilities

Cross-regional diagnostic image access with other key hospitals across Germany

**Five-year capital deal**, with base value to PME of **A\$3 million**

Deconstructed PACS® gaining momentum in Europe

Expands Visage footprint in key German hospital market

**Mercy Health System** to use Pro Medicus' **Visage 7** technology for primary diagnosis and distribution of medical images

**Seven-year deal** with base value to PME in excess of **A\$21M (USD \$16.7M)**

Mercy has 46 acute care and specialty hospitals spanning four US states

Transaction-based model with potential upside

First deal as part of the ROi Master purchasing agreement

**Franciscan Missionaries of Our Lady Health System (FMOLHS)** to use Pro Medicus' **Visage 7** technology for primary diagnosis and enterprise distribution of medical images

**Seven-year deal** with base value to PME of **A\$7M**

Transaction-based model with potential upside

Second deal as part of the ROi

PME signs **6 year deal** with **Mayo Clinic** in the US

Visage 7 to be implemented enterprise-wide throughout Mayo Clinic's Radiology departments

Estimated value to PME in excess of **AUD \$18 million**

Transaction-based model with potential upside

Third major US deal in 4 months

Recent deals reposition PME in US market

**7 year deal** with **Yale New Haven Health** in the US.

Estimated value to PME in excess of **AUD \$18M**.

Visage 7 to be implemented across Yale's radiology departments and enterprise-wide for clinical access to imaging results.

Transaction-based model with potential upside.

Consolidates PME in the US academic radiology space.

### Visage Open Archive

Built on the same ultrafast, highly scalable enterprise imaging platform used in Visage 7.

Modular design based on open standards ensures maximum interoperability even in the most complex environments.

Already in use in many large scale implementations outside the U.S.

Enables Visage to offer choice of deconstructed or single vendor solutions.

Well placed to fill the needs of a rapidly changing North American archive market.

**Visage** unveils advances in **artificial intelligence (AI)** at the RSNA 2017 Machine Learning Showcase.

Visage 7 – the only solution to combine both AI research and AI aided diagnostic interpretation capabilities in a single, enterprise imaging platform.

Algorithms developed by Visage as well as third parties will be demonstrated

**Visage** releases 7.1.11 of EI platform. Latest version features over 170 software enhancements, including support for DICOM standard Breast Projection Objects and various in-viewer workflow improvements.



# Conclusion and Recommendations

**Visage Imaging**, a small player in the PACS domain, has won a number of large deals in the US over the past few year. They have a strong story to tell regarding their single viewer and the technology (HTML5, server-side rendering, etc.). This is especially effective for the Healthcare IT departments looking to deconstruct their PACS. Visage offers an integrated RIS/PACS workflow; and also plays well with organizations who have distributed reading workflows (remote, home reading, and teleradiology). However, once you get beyond the immediate needs of the Radiology department, Visage's story weakens. **Philips offers a much deeper and wider set of healthcare IT solutions, covering a wide array of patient images and data in a secure, standards-based environment.** Position Visage as a niche player that doesn't go much further than the viewing and storing capabilities required for a PACS system. **Philips offers a true Enterprise Imaging technology suite that Visage simply cannot match.**

## Keep in mind

**We offer a much deeper and wider set of healthcare solutions.** We innovate across the health care continuum from supporting predictive and preventative care to connecting care in the home. The scope of our healthcare portfolio is greater than Visage's.

- **Illumeo.** Visage does not yet have an AI offering.
- **IntelliSpace Portal.** Visage AV offering is not as comprehensive as our ISP portfolio.
- **Philips DoseWise** solution. Visage does not offer a dose monitoring solution.
- **Our Cardio portfolio.** Unlike Philips, Visage does not play in this domain. We have a complete cardio portfolio including CVIS, ECG management, Epic integration, Cardiograph, Stress, Holter, Hemodynamic, Ultrasound, IGT, Cardio Advanced Visualization solutions.
- **Patient Monitoring, Oncology, Pathology, Population Health, CT, MR and US** solutions. Visage does not have such offerings.
- **The Philips team.** We have a large North American team. Customers value our people, technology and services. Philips has earned a strong reputation of taking care of its customers.

## To win...

- Grow the deal - make it bigger than radiology. Include Radiology Analytics, Advanced Mammography, Visible Light, Cardiology, Digital Pathology, Dosewise, etc
- Leverage Performance Bridge offering to differentiate ourselves
- Position Illumeo, as it is Zero Footprint just like Visage
- Philips scale is important, huge stable global healthcare company

## Final remarks

- Philips is positioned very well to support IDN/Regional Health System "core vendor strategy" across multiple service lines in the enterprise.
- Leverage the Philips Account Executive to collaborate on account needs, relationships, approach and strategy (especially at the CIO, CMIO and CFO levels).
- As does Visage, we must include Radiologists, Cardiologists, System Administrators, Technologists, IT Managers and department heads in the discussions.
- Ensure we position ourselves as a comprehensive Healthcare Informatics and Imaging leader.
- If needed, consider utilizing IntelliSpace Enterprise Edition to elevate our position and change the game especially at the C-level.

