



PHILIPS

Healthcare Informatics




Selling the Healthcare Informatics portfolio

Competitor knowledge book: Change Healthcare (formerly McKesson)

November 2017

Version 1.0



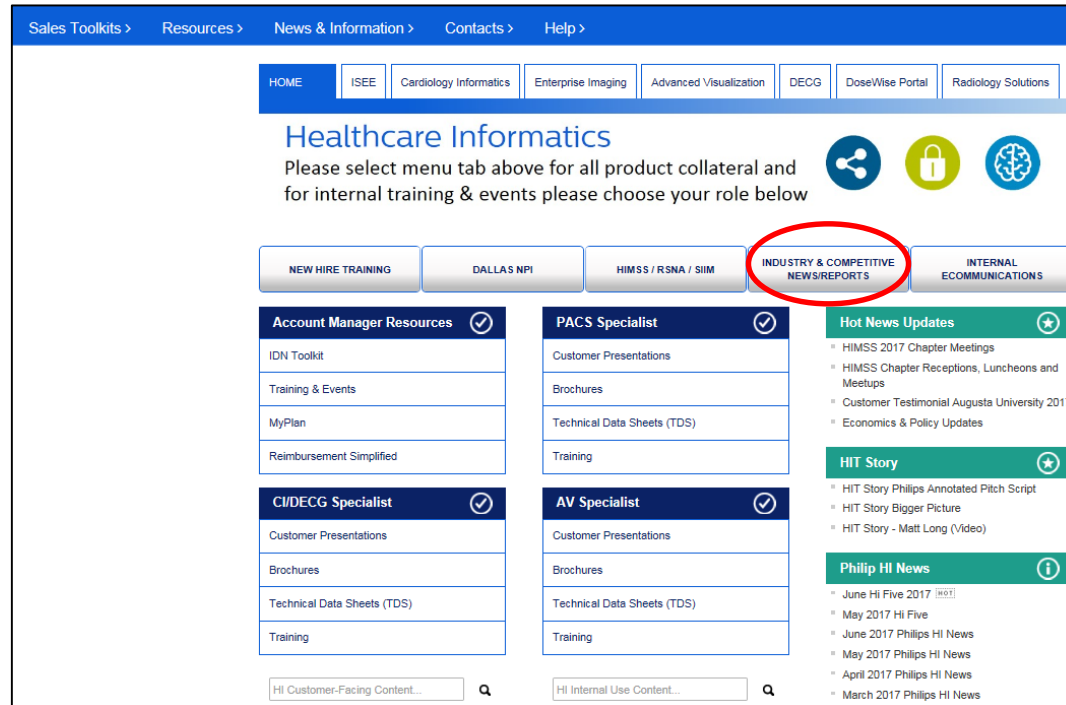
Introduction

- 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

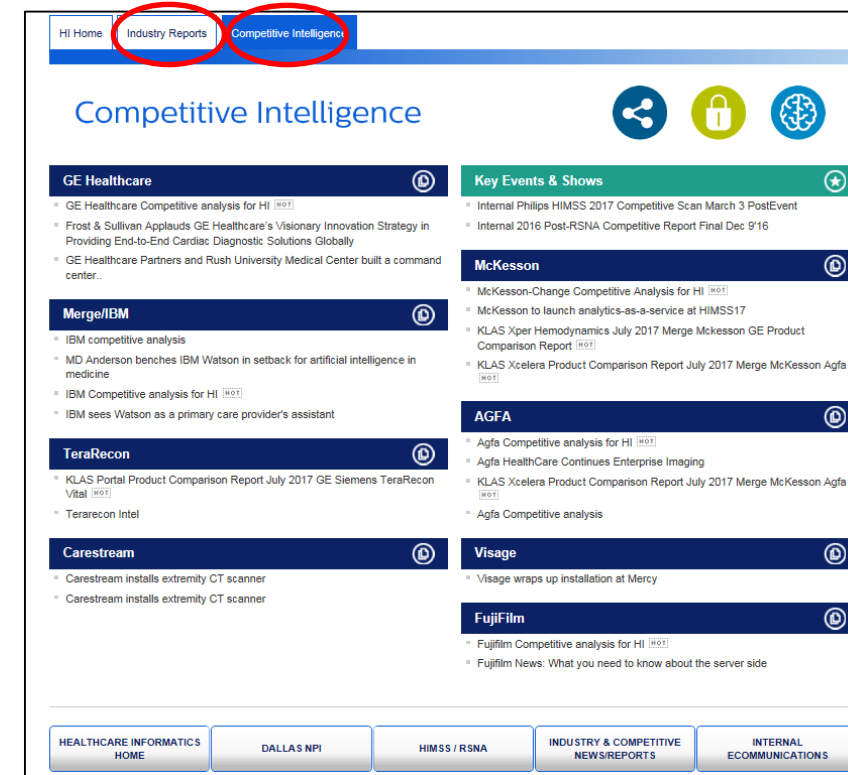
Market and competitive intelligence

- 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



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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November 2017
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A side-by-side comparison

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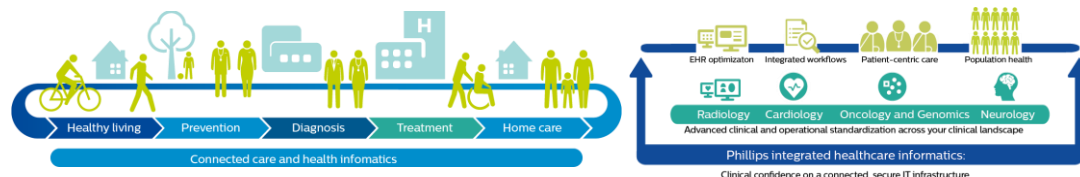
Philips has a clear core vendor strategy in the healthcare informatics space. McKesson is undergoing a great deal of “change” as they rebrand to Change Healthcare and there is a lot uncertainty about their direction.

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.



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



Intelligent

Automated workflows, advanced visualization and stronger clinical collaboration

CHANGE HEALTHCARE

Enterprise Medical Imaging Solutions

McKesson has combined with Change Healthcare to form a new health IT company with one focus – inspiring a better healthcare system.

Change Healthcare's comprehensive portfolio showcases technologies to establish an enterprise imaging strategy to drive better healthcare ambitions.

Flexible and vendor-neutral, Conserus seamlessly helps to aggregate images and other longitudinal patient information from disparate systems to promote efficient workflow and lower costs, while reducing the duplication and complexity introduced through regionalization. The suite of vendor neutral archive solutions helps you engage the whole care team and ensures images are delivered when and where needed—across the entire enterprise.



Portfolio comparison – Philips view

We are stronger both in the breadth and depth of our offerings

Philips



Managed service (ISEE)	Radiology PACS	IntelliSpace PACS – See attack section.	McKesson Radiology PACS, has not rebranded to Change Healthcare
	Advanced Workflow Orchestration	See IntelliSpace Radiology Workspace Solution NPI materials and attack section	Conserus Workflow Intelligence provides workflow enhancements. This is an additional charge on top of McKesson PACS
	Radiology Analytics	See IntelliSpace Radiology Analytics NPI materials and attack section	Yes, but this is an additional charge
	Enterprise Imaging/ Visible Light	IntelliSpace Visible Light Capture	Yes, but this is an additional charge
	VNA	IntelliSpace Universal Data Manager – See NPI materials	VNA via TeraMedica acquisition
	Universal Viewer	Leverage roadmap via field marketing if this is a challenge	Not explicitly promoting a universal viewer however, does promote a single viewing environment. This viewer is a rebranded viewer from Calgary Scientific (different database).
	AI Offering	Illumeo – see NPI materials (currently for radiology only)	Imaging Fellow solution has clinical context but no AI yet.
	Cardiology CVIS	IntelliSpace Cardiovascular – See attack section. Leverage connections with IGT-S, DXR, US	McKesson Cardiology, has not rebranded to Change Healthcare
	ECG Management	IntelliSpace ECG and ECG devices – See attack section.	McKesson Cardiology ECG Management, has not rebranded to Change Healthcare
	Hemodynamics	Xper Information Management with Xper Flex Cardio – See attack section. Leverage connections with IGT & PIICiX/IntelliVue.	McKesson Cardiology Hemodynamics/Cath has not rebranded to Change Healthcare
	Advanced Visualization	IntelliSpace Portal – See attack section	Yes, but the standard AV in PACS is very weak and they have to partner with Vital or Tera to get close to our offering
	Dose Management System	DoseWise Solutions for patient/staff radiation safety. Work with field marketing for add'l information.	Conserus Workflow Intelligence provides dose management. This is an additional charge on top of McKesson PACS
Core	Imaging Modalities (CT, MR, US, DR)	Align with DI and AE teams	No comparable offering
	Patient Monitoring	Align with AE and Patient Monitoring teams	No comparable offering
Emerging areas	Genomics	IntelliSpace Genomics. Work with field marketing for more information.	Partnered with AutoGenomics
	Oncology	Emerging: Ask field marketing for roadmap help, if required	No comparable offering
	Pathology	IntelliSite Pathology Solution. Work with field marketing for more information or Digital Path sales team.	No comparable offering
	Population Health	Align with the Philips WellCentive team	Population Health Solutions

Coloring is a qualitative indication of product/portfolio strength (green– strong; yellow – emerging capability; red – weak)

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Solution set comparison

We are stronger both in the breadth and depth of our offerings

IntelliSpace solutions

Philips IntelliSpace Solutions help simplify clinical workflow, provide economic value, and improve patient care across entire health systems. Make informed decisions with confidence.

Radiology

[iLlumeo](#)

Changing how you see, seek and share clinical information

[IntelliSpace PACS Radiology Workspace Solution](#)

Efficiency or quality? Choose both

[IntelliSpace PACS iVault](#)

PACS archive solution

[IntelliSpace Universal Data Manager](#)

Interoperable archiving and management solution for the healthcare enterprise

[IntelliSpace PACS Advanced Mammography](#)

Streamline the review of diagnostics mammography studies

[IntelliSpace PACS Anywhere](#)

Mobile platform image distribution

[IntelliSpace PACS Federation](#)

PACS archive solution

[IntelliSpace VL Capture](#)

Visible light workflow tool

[IntelliSpace Radiology Analytics](#)

Tuning complex data into clear decisions

Cardiology

[IntelliSpace Cardiovascular](#)

Integrated multimodality image and information system designed to perform the necessary functions in cardiology.

[Xper Information Management with Xper Flex Cardio](#)

Cardiovascular workflow solution

[IntelliSpace ECG](#)

ECG Management Solution

Advanced Visualization

[IntelliSpace Portal](#)

Multimodality advanced visual analysis solution

Over 70 clinical applications for Cardiology, Neurology, Oncology, Vascular, Pulmonary imaging

Radiation dose management

[Philips DoseWise](#)

Radiation dose management software platform for healthcare providers to record, track and analyze radiation exposure to patients and clinicians.

Managed Service

[Philips IntelliSpace Enterprise Edition](#)

Conserus Solutions

Enterprise Medical Imaging Solutions deliver images across the enterprise with Conserus™ interoperability and vendor neutral archive solutions.

Radiology

[McKesson PACS](#)

Radiology Imaging Software Provides Access to Information Wherever and Whenever You Need it, Helping You Improve Workflows and Reduce Costs

[McKesson Radiology Mammography Plus](#)

Advanced Digital Mammography System and Diagnostic Imaging Interpretation Workflow. Using Only Your PACS.

[McKesson Study Share](#)

Organize & Share Medical Imaging, Teaching Files and Reference Cases Efficiently Across Your Enterprise

[Conserus – Workflow Intelligence](#)

Help Drive Efficient, Predictable Workflow Processes Across the Enterprise

[Conserus – PACS-Neutral Mobile Medical Imaging Viewer](#)

A single, Universal Viewer that Brings Images and Reports Together for Easier Diagnosis and Collaboration

[Conserus – PACS-Neutral Medical Image Archiving System](#)

Vendor Neutral Archive Solutions—A Better Way to Archive, Manage and Deliver Your Imaging Data

[Conserus Clinical Data Exchange](#)

A Better Way to Manage and Share Non-DICOM Images and Clinical Documents Within the Enterprise and Across the Region.

[Conserus Imaging Fellow](#)

Help Improve Imaging Diagnosis With Clinical Data Integration

Cardiology

[McKesson Cardiology](#)

Designed to bring together all of the information you need into a single platform—a true cardiovascular information system ([CVIS](#))

[McKesson Cardiology Hemo](#)

integrated hemodynamic monitoring system aggregating hemodynamic data, waveforms and images in one cardiac patient record

[McKesson Cardiology Cath](#)

Cardiovascular image and information management for the cath lab.

Advanced Visualization:

None! Integrates with Vital and TeraRecon

Vital: [Vitrea Advanced Visualization](#)

TeraRecon: [iNtuition](#)

Radiation dose management

[Conserus – Workflow Intelligence](#)

Help Drive Efficient, Predictable Workflow Processes Across the Enterprise. Includes radiation dose management.

Managed Service

[McKesson Managed Service](#)

McKesson delivers the advantages of a dynamic IT approach through its portfolio of infrastructure, application, workplace, foundational and sourcing services, and decades of experience providing health care IT solutions and managed services that help enhance business and patient health.

Selling against Change Healthcare
(formerly McKesson)

Radiology informatics

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: attack strategy - business model (Target audience - CFO)

Features	Advantages	Benefits
Unique managed service	All-inclusive contract with transparent total cost of ownership	<ul style="list-style-type: none"> • Reduces the costs and risks of system acquisition and guarantees system performance • Known and predictable costs for the period of the contract (Predictable budgeting) • Financially aligned incentives for growth and uptime • Built in on-demand scalability allowing you to add users, workstations, modalities, exams, applications, and facilities as needed • Includes software upgrades and hardware obsolescence protection • Supports continual innovation throughout your investment • Contractually committed monthly uptime guarantee of 99.9% or 99.99% • 3-second image access guarantee
Fee-per-study model	Operational expense vs. capital purchase	<ul style="list-style-type: none"> • Align spend directly with usage (CIO/CFO/Management) • Business model flexibility depending on the customer's financial situation and needs
Proactive service and support	Rapid response to issues at any time.	<ul style="list-style-type: none"> • Faster resolution of issues and focus on the customer's business goals, which leads to more efficient patient care. Our standard proactive service includes: <ul style="list-style-type: none"> • 24x7x365 Proactive monitoring system with Live Tech Support • Support services included in all contracts • Automated backups with off-site disaster recovery
Open platform for integration with third-party solutions	Easily interface with a broad range of EMRs, third-party and customer developed solutions	<ul style="list-style-type: none"> • Choice of best of breed tools from Philips, 3rd party vendors, and homegrown • Allows you to design and customize your environment based on your specific needs, leading to increased workflow efficiency and productivity
Enterprise Imaging platform	Manages a wide array of patient images and data in a secure, standards-based environment	<ul style="list-style-type: none"> • Common viewing platform for enterprise imaging needs, including Radiology, Cardiology, Mammography, Visible Light, and more • It offers 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

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: attack strategy – clinical workflow (Target audience - Department chair)

Features	Advantages	Benefits
Advanced workflow orchestration	Empowers Radiologists to manage their work more efficiently	<ul style="list-style-type: none"> • Empower your radiologists to meet specific clinical and business goals, and better server the referring community • Reduce or even eliminate the need for (costly) 3rd party workflow orchestration solutions
Clinical intelligent software, leveraging Adaptive Intelligence Illumeo (click here)	It augments the skills of your clinicians, redefining how they currently interface with images	<ul style="list-style-type: none"> • Delivers a tailored workflow experience, as it adapts to the context and to the user preferences • Assist physicians with best practices to help standardize care • Produces a more meaningful, insight-rich output that can help physicians get to the right decision for their patients and improve care • Improves collaboration between departments within the hospital and with referring physicians
Mammography with Tomosynthesis	Advanced Mammography reading from your IntelliSpace PACS Radiology workstation provides a single point of access for a holistic view of your patient's medical history	<ul style="list-style-type: none"> • Seamless radiologist reading workflow with digital tools designed for screening, diagnostics and digital breast tomosynthesis review • Removes the need for dedicated mammography reading workstations, reducing cost, saving time, and creating space and flow in the radiologist workspace • Enhanced system performance to meet the needs of the increasing size of the mammography data sets
Integrated advanced visualization 3D tools within PACS workflow	Single workspace to address all clinical needs	<ul style="list-style-type: none"> • Launch relevant clinical applications from a single workspace, increasing workflow and productivity • Reduce number of workstations, and associated costs and resources needed to support, maintain, upgrade, route and pre-fetch studies to disparate workstations
Visible Light capture and management	Integral part Part of PACS platform	<ul style="list-style-type: none"> • Intelligent clinical workflow provides a seamless user experience and a single repository to manage virtually all your medical images across the enterprise • Improve security/privacy of personal information (access control, audit trail, etc.) • Mobile, software-based solution grows with your enterprise and enables collaboration • Image enable the EMR
Radiation dose management	Integrated radiation dose data and reporting from DoseWise Portal to IntelliSpace PACS	<ul style="list-style-type: none"> • Dose related information is aggregated from multiple channels, including DICOM Radiation Dose Structured Reports, OCR on legacy dose sheets, Modality Performed Procedure Step (MPPS), or other image headers • IntelliSpace PACS users can easily analyze and interpret patient radiation dose per exam and overall cumulative exposure. DoseWise Portal sales toolkit on OneSource

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: attack strategy – infrastructure (Target audience - CIO)

Features	Advantages	Benefits
Security	Secure hosting environment, secure software development, and secure application software	<ul style="list-style-type: none">• Managed, secure hosting environment complying with National Institute of Standards and Technology (NIST) and US Department of Defense Risk Management Framework (RMF) security and defense standards for security peace of mind• Enhanced application level security, including authentication, session management, user-defined password management, access control at user and role levels, auditing, and data integrity checks• An HIT partner you can trust to protect the confidentiality, integrity and availability of patient health information
IntelliSpace Universal Data Manager	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	<ul style="list-style-type: none">• Scalable: Capable of managing huge volumes of data along with Clinical Image Lifecycle Management• Interoperable: Open and standards-based, protecting existing and prospective investments• Performant: Rapid retrieval; efficiently includes advanced clinical image lifecycle rules• Universal: Integrated medical imaging record; managing ordered and non-ordered images• Secure: Software – secure by design, with disaster recovery in the cloud and data encryption in transit
Open platform for interoperability with third-party solutions	Easily interface with a broad range of EMRs, 3 rd party and customer developed solutions	<ul style="list-style-type: none">• Choice of best of breed tools from Philips, 3rd party vendors, and homegrown• Design and customize individual environments based on specific needs for improved efficiency and productivity

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: defend strategy 1 of 3

Change Healthcare claims	Additional details	Philips response
<p>McKesson Radiology PACS</p> <p>Picture archiving and communication system (PACS) enables hospitals and clinics to acquire, distribute and archive medical images and diagnostic reports across the enterprise.</p>	<p>Our comprehensive PACS system includes:</p> <ul style="list-style-type: none"> • Volumetric CT and MR Solutions • Teaching File Solutions/Study Share • McKesson Radiology Collaboration • Improved Enhancements Program: 30 day turnaround on enhancement requests* <p>Optional add-on solutions:</p> <ul style="list-style-type: none"> • Native Mammography Solutions • McKesson Radiology Analytics 	<p>The biggest difference with McKesson PACS and Philips PACS is that Philips offers a managed service and doesn't nickel and dime their customers. For example, while Philips PACS includes everything from hardware, to disaster recovery services, to business continuity, and a multitude of different value-added applications. McKesson/Change Healthcare charges for every little thing. It behooves the Account Manager to understand this so they are equipped to talk about total cost of ownership with Philips compared to Change Healthcare.</p> <p>Philips IntelliSpace PACS is comprehensive enterprise imaging solution. It provides the necessary imaging tools for radiologist reading workflow, including embedded advanced visualization tools. While McKesson offers a few CT and MR apps with their PACS, IntelliSpace PACS may be further enhanced by any of 70+ IntelliSpace Portal applications spanning multiple different clinical domains.</p> <p>McKesson's Study Share application has tremendous functionality and we must be prepared to talk about this; especially when competing on a university health system. IntelliSpace PACS also has some terrific workflow tools embedded to promote sharing and collaboration. Folders are simple and effective at managing study sharing and IntelliSpace PACS furthers collaboration efforts by enabling radiologists and clinicians to chat directly and share study links for patient-centered discussions. While McKesson's Radiology Collaboration allows a radiologist to screen share their system with others, IntelliSpace PACS enables radiologists and clinicians to collaborate in real time by sharing the study link through the communication tools. If Study Share and teaching file support become a sticking point please leverage roadmap via field marketing.</p> <p>IntelliSpace PACS Advanced Mammography offers seamless radiologist reading workflow with digital tools designed for screening, diagnostics and digital breast tomosynthesis review. IntelliSpace PACS Radiology Analytics is included with the standard PACS offering (note: there is a one time implementation fee).</p> <p>*Note: McKesson's is claiming 30 day turnaround on their enhancement requests. As of writing this, there is no information available to substantiate these claims.</p>
<p>Conserus – Workflow Intelligence</p> <p>Increase medical imaging productivity, and optimize reimbursement with the diagnostic imaging workflow tools in McKesson's information system for hospitals and health systems.</p>	<p>Conserus Workflow Intelligence lets you:</p> <ul style="list-style-type: none"> • Consolidate interpretation and quality tasks • Roll out predictable, robust processes across your organization • Define your own workflow rules that align with your business rules • Automate workflows across departments and facilities • Alert staff to missed steps and workflow bottlenecks • Monitor process performance to help prove quality and drive operational improvements • Optimize use of subspecialist resources through intelligent assignment • Prioritize and escalate cases with a dynamic model that helps meet your business objectives and SLAs 	<p>Conserus Workflow Intelligence is similar to Philips Radiology Workspace solutions with a few key difference; cost and solution benefits.</p> <p>Philips Radiology Workspace Solution is driven by the fundamental understanding of clinical workflow. RWS brings a new environment to empower the radiologist's workspace to deliver additional value through greater efficiency and quality. While similar to McKesson's Conserus Workflow Intelligence engine, Radiology Workspace Solution is INCLUDED in the service-delivery model. This means there are NO additional fees, NO additional hardware, and NO hidden service fees with the Philips contract.</p> <p>Moreover, how intelligent is a Radiologists reading workflow if the Advanced Visualization tools are not integrated within the platform. This is what McKesson is selling, a disjointed approach to the Radiologist's reading room. Sure Conserus Workflow Intelligence has a number of nice features to ensure the Radiologist's are getting the appropriate exams on their worklist, but Philips approach is a complete approach. Philips IntelliSpace PACS, Radiology Workspace Solution along with the IntelliSpace Portal applications provide a seamless workflow for Radiologists; from locating the exam on the worklists, viewing the images on the diagnostic monitors, and launching advanced capability for complex studies. Our solution is 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 between disparate solutions.</p>

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: defend strategy 2 of 3

Change Healthcare claims	Additional details	Philips response
<p>Conserus – PACS-Neutral Mobile Medical Imaging Viewer</p> <p>Make clinical decisions and coordinate care 24/7 with the web-based medical imaging viewer in McKesson's information system for radiologists and radiology departments.</p>	<ul style="list-style-type: none"> • Access medical images from any web-enabled device • Utilize advanced software tools for diagnosis from any location • Collaborate in real-time with other clinicians • Gain mobility with a secure, zero-footprint viewer through HTML5 or Flex client • Launch in context from EMR • Support for multiple device platforms, browsers, and screen sizes • Multi-ology support • Can be used for diagnosis on images produced by the majority of modalities, with the exception of mammography • Support for multiple PACS and multi-vendor PACS environments • Secure architecture and server-side rendering to help protect patient data 	<p>McKesson's PACS-Neutral Viewer is absolutely PACS-Neutral. This is because it is an application developed by Calgary Scientific and rebranded by McKesson. Customers should understand who has developed the product. IntelliSpace PACS Anywhere brings similar functionality to that of Conserus PACS-Neutral Mobile Medical Imaging Viewer, but our system was developed in-house and further solidifies our healthcare brand. We are focused on healthcare and continue to innovate in this space with our own development efforts. Philips Research and Development is a strong asset of Philips and our in-house development of IntelliSpace PACS Anywhere highlights our commitment to developing and delivering solutions. While McKesson continues to divest itself; for example, selling its EMR business and reselling 3rd party solutions, Philips continues to innovate and bring its own solutions to market.</p> <p>Conserus PACS-Neutral Viewer will have additional costs associated with the hardware to support the solution alongside the McKesson PACS system. With Philips Managed Service, our customers receive IntelliSpace PACS Enterprise and IntelliSpace PACS Anywhere at no additional cost. These enterprise imaging distribution systems are included in the contract and do not require additional fees to support or deploy them. Our service-delivery model should really be pushed here to ensure the customer understands the total cost of ownership and the value they get with the managed-service compared with McKesson's nickel and diming contracting tactics.</p> <p>Conserus PACS-Neutral Viewer has a different look and feel than the standard McKesson PACS and only provides limited access to patient's studies. Whereas IntelliSpace PACS Enterprise and our Anywhere Viewer has access to the entire imaging history; including cardiology and visible light images.</p> <p>If discussion goes to universal viewer functionality please leverage roadmap via field marketing.</p>
<p>Conserus – PACS-Neutral Medical Image Archiving System</p> <p>Simplify imaging workflows and decision-making with the vendor-neutral image storage and retrieval tools in McKesson's information system for radiologists and radiology departments.</p>	<ul style="list-style-type: none"> • Centralized management of enterprise medical imaging data, optimizing the number of individual systems that need to be maintained • Economies of scale by investing in a single larger storage platform for all image data • Savings from never needing to migrate PACS data again • Create retention/purge rules that are in line with official hospital retention policies and that may be set per facility according to jurisdictional requirements • Help protect patient data for legal cases • Allows you to determine which studies to delete using multi-phase review and delete cycle 	<p>Conserus PACS-Neutral Medical Image Archiving System is being sold as a VNA type offering. However, as of writing this, there are no current proof points being shared by McKesson/Change Healthcare to substantiate the claim that this offering is being sold with different PACS systems on top of it. Philips is likely ONLY to run up against this offering with McKesson is selling their PACS system along with their "PACS-Neutral" Medical Image Archiving Solution. As a result, we play well in this space nicely with our Universal Data Management (UDM).</p> <p>For PACS customers who want both scalability and performance, while also achieving interoperability and universal image and data management, UDM offers a no-compromise solution to managing and storing a wide array of patient images and data in a standards-based environment. Unlike traditional VNAs, there is no expensive migration or loss of performance. Customers can access images in a matter of seconds, while also achieving scalability and interoperability for all images and related data in a secure system with high performance metrics.</p> <p><i>*Note: McKesson's is claiming to be PACS-Neutral, but have they sold this solution to other systems not using they PACS or their archive. As of writing this, there is no information available to substantiate these claims.</i></p>

Selling against Change Healthcare (formerly McKesson)

IntelliSpace PACS: defend strategy 3 of 3

Change Healthcare claims	Additional details	Philips response
<p>Conserus Clinical Data Exchange</p> <p>A standards-based solution made up of a family of products to facilitate management and sharing of the patient's published images and related clinical documents - including the ability to manage and share non-DICOM images (and image-related documents) from multiple 'ologies - from within the same facility, enterprise, or even across the region.</p>	<p>Conserus™ Clinical Data Exchange family of products enables you to manage and share non-DICOM images (and image-related documents) from all image-generating departments within the enterprise and across the region.</p> <ul style="list-style-type: none"> • Manage and share the patient's images and related clinical documents, across one or more health care enterprises • Single view of patient images and related clinical documents • Turnkey approach to modular or enterprise deployment model • Remote system monitoring and evaluation 	<p>Conserus Clinical Data Exchange is another add-on solution from Change Healthcare. The IntelliSpace Visible Light Capture application is can optionally be included in the managed service contract. The Visible Light Capture application includes the following key advantages:</p> <ul style="list-style-type: none"> • Intelligent clinical workflow provides a seamless user experience and a single repository to manage virtually all your medical images across the enterprise • Security features protect patient data • Mobile, software-based solution grows with your enterprise and enables collaboration <p>IntelliSpace Visible Light Capture is designed for iOS mobile phones and tables or an SLR camera, VL Capture makes it easy for you to include visible light images and videos in your PACS, securely bringing valuable clinical information to those making patient care decisions.</p>
<p>Conserus Imaging Fellow</p> <p>Improve diagnoses by merging patient health information and imaging orders with the data integration tools in McKesson's information system for radiologists and radiology departments.</p>	<p>Conserus Imaging Fellow is a web-based, zero footprint solution within the imaging cockpit that provides a context-sensitive view of the relevant clinical data from multiple information systems across the organization.</p> <p>Conserus Imaging Fellow Helps Organizations:</p> <ul style="list-style-type: none"> • Optimize data selection and display for imaging users • Improve clinical data integration • View relevant ancillary clinical data in conjunction with imaging studies • Gather relevant patient data from other data sources (EHR, PACS) to present a longitudinal patient record <p>Conserus Imaging Fellow Includes:</p> <ul style="list-style-type: none"> • Clinical data views in widgets, expandable/collapsible panes and full/partial screens • Integration with EHR systems • Vendor neutral design to support multiple imaging and clinical applications • Flexible configuration options 	<p>Conserus Imaging Fellow is yet another add-on solution with additional hardware and additional cost for the customer. Moreover, this integration is presented in a separate window from the McKesson PACS system.</p> <p>Philips Illumeo with adaptive intelligence provides a patient briefing which displays tailored and filtered access to relevant clinical context, presented in a clear and meaningful way—patient problem list,* laboratory results, prior radiology reports, imaging orders or scanned documents obtained from health information systems like Electronic Medical Record [EMR] or Radiology Information Systems [RIS]. Illumeo goes beyond simple data display and creates value in the following ways:</p> <ul style="list-style-type: none"> • Synthesizes holistic view of patient • Presents prior reports and extracts relevant patient history from EMR or RIS • Presents data in a meaningful way • Allows quick and easy local inspection of a region of interest • Inspection Reticle provides relevant tools for the observation based on what the user is viewing • Features Anatomy-Aware capabilities • Generates dynamic, insight-rich findings presentations • Minimizes user input to produce 3D images or automated quantifications • Improves collaboration between departments within the hospital and with referring physicians <p><i>*Note: McKesson's claim of integrating with the EHR and acquiring data to present a longitudinal patient record is only available with Cerner. As of writing this, McKesson does not have Conserus Imaging Fellow integrated successfully with Epic.</i></p>

Selling against Change Healthcare (formerly McKesson)

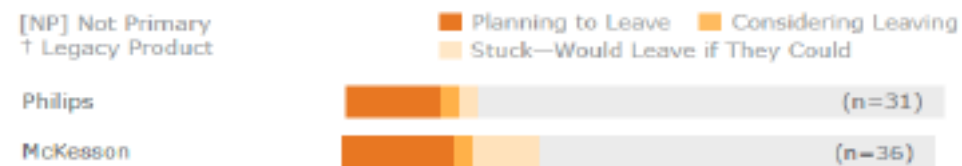
KLAS insights, PACS category

Sectra, INFINITT, Carestream and McKesson leading in PACS performance, still solidifying place in enterprise imaging.

McKesson customers, especially imaging centers, have noted improvements to contracting, implementations and upgrades, and support. Providers note that all of these performance leaders will need to expand their experience and visibility outside of PACS in order to keep pace with vendors such as Agfa HealthCare, GE Healthcare, and Merge, who are better known for having enterprise imaging– focused approaches.

Large Hospital Customer Retention and Loyalty (>200 Beds)

[NP] Not Primary
† Legacy Product



For hospitals larger than 200 beds, there are more customers planning to leave McKesson AND more customers who feel stuck, but would leave if they could. While Philips has some challenges, we still have more loyal customers in the market we play most in, larger hospitals and IDNs.

Detailed Breakdown of PACS Overall Scores

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

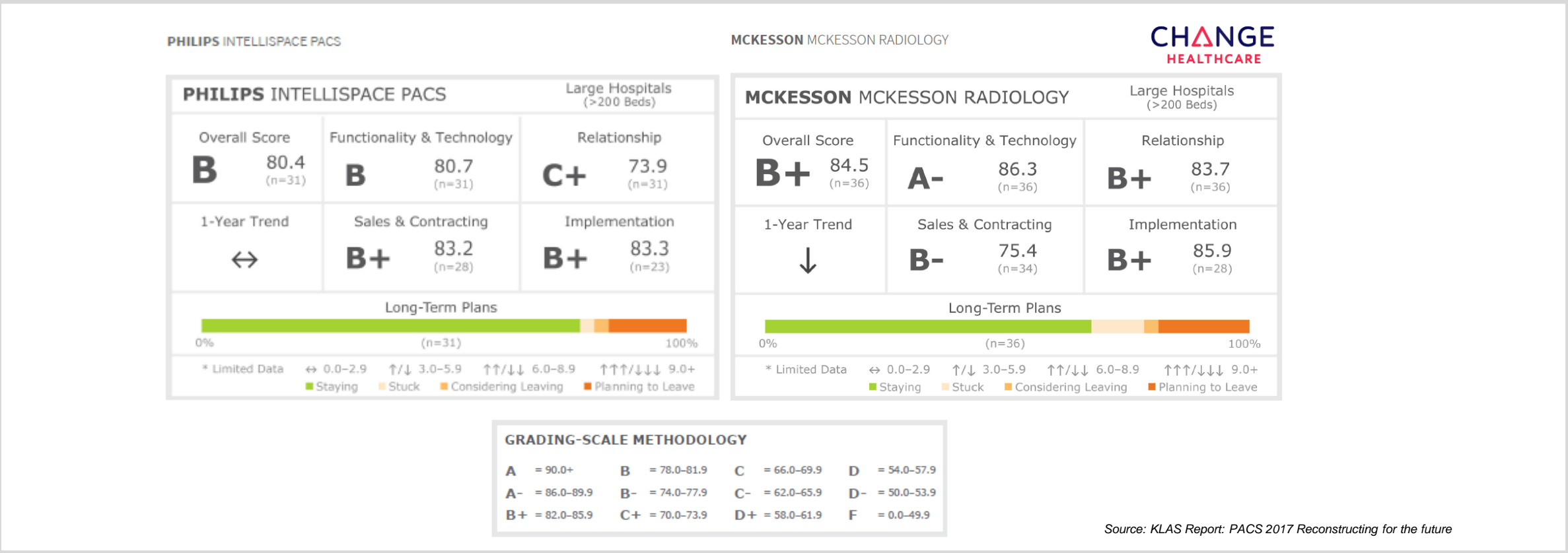


Source: KLAS Report: PACS 2017 Reconstructing for the future

When competing, it is important to promote our innovation and service delivery model. Philips has a strong brand and we should tell the story of our innovation and integrated solutions which we have developed in-house. Does Change Healthcare's brand have this same value? Do our customers know where Change Healthcare is headed?

Selling against Change Healthcare (formerly McKesson)

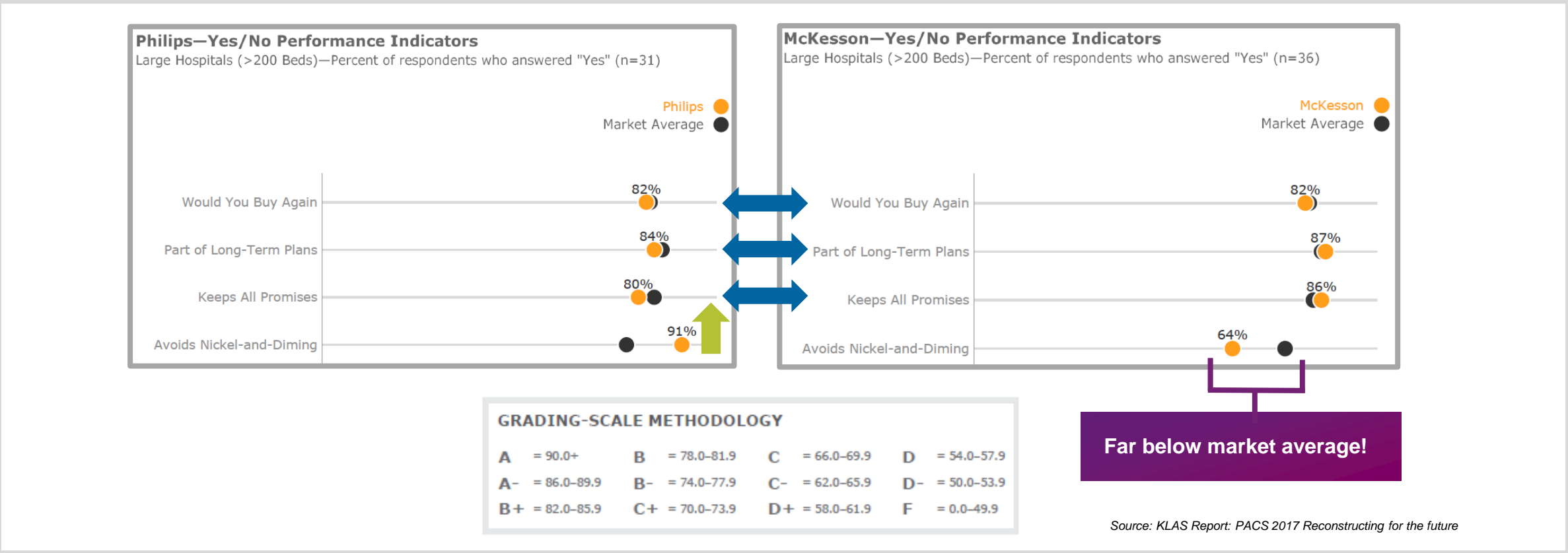
KLAS insights, PACS category



From a KLAS ranking standpoint, there does appear to be some areas where McKesson can attack us, specifically around relationships and technology. Be sure to reinforce the value of the Account Manager and supporting Sales Specialist to your customer.

Selling against Change Healthcare (formerly McKesson)

KLAS insights, PACS category



Comparing some of the key questions shows a telling story. For larger facilities, we see that Philips and Change are about the same. However, 9 of 10 customers state that Philips “Avoids nickel-and-diming” our customers; whereas only 6 of 10 McKesson customers stated they “Avoid nickel-and-diming”.

Selling against Change Healthcare (formerly McKesson)

KLAS insights: PACS category

Overall KLAS Score:

Philips 78.8

Change 88.2

Category	Ranking	Insight
Philips service delivery model is the champion here against Change Healthcare.	<p>Avoids charging for everything: PHILIPS = 86% vs CHANGE HEALTHCARE = 71%</p> <p>Sales and contracting category: PHILIPS = 80.5% vs CHANGE HEALTHCARE = 83.1% (PACS average =79.6)</p>	<ul style="list-style-type: none"> Philips service delivery model with known total cost of ownership is a powerful differentiator, and we must be prepared to explain the total cost of ownership with our model compared to McKesson McKesson will charge for many things which may or may not be apparent to the customer: hardware, Conserus workflow, Conserus Imaging Fellow, Disaster Recovery services, Business Continuity, and multiple interface configurations with their disparate systems
Change Healthcare stronger than Philips at the moment with functionality and upgrades	<p>Functionality & Upgrades PHILIPS = 79.8% vs CHANGE HEALTHCARE = 89% (PACS average =79.9%)</p>	<ul style="list-style-type: none"> It is important to remind customers of our service delivery model and that upgrades, along with the innovation which accompanies them, is included in the model Customers should also know that Philips has been innovating in the technology and healthcare space for a long time. We are delivering cutting edge technology with Illumeo and IntelliSpace Portal
Change Healthcare seems to have better trust from their customers	<p>Keeps all promises: PHILIPS =77% vs CHANGE HEALTHCARE = 92%</p> <p>Service and Support category: PHILIPS =76.1% vs CHANGE HEALTHCARE = 87.2% (PACS Average = 79.4)</p>	<ul style="list-style-type: none"> Philips has earned a strong reputation of taking care of its customers. While sometimes we may not seem fast enough, we do deliver. Sometimes we may be too hard on ourselves. Remember, with our service-delivery model, we offer and support the customer in many different ways
Change Healthcare is likely to get recommended more than Philips, but not by much	<p>Likely to recommend: PHILIPS = 7.0 vs CHANGE HEALTHCARE = 8.0 (PACS Average =7.2)</p>	<ul style="list-style-type: none"> Customers do value our people, our technology and our service...so be confident in that. We have an opportunity to improve our product and services and will continue to do so. Philips spun off its lighting and consumer electronic brand so it could focus solely on healthcare. Our brand is strong and you can't say that about Change Healthcare
More customers have Change Healthcare as part of their long term plans; although this is about even with hospitals >200 beds	<p>Part of long term plans: PHILIPS = 79% vs CHANGE HEALTHCARE = 92% (PACS Average = 84%)</p>	<ul style="list-style-type: none"> Be confident in our Enterprise Imaging approach and ensure the customer knows we bring value through our business model, best of suite products, and dedication to innovation

Source: snapshot report from KLAS website, August 22, 2017

Selling against Change Healthcare
(formerly McKesson)

Cardiology informatics

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Cardiovascular: attack strategy

Features	Advantages	Benefits
Cardiology timeline	Make informed decisions with a comprehensive overview of your patient. Minimizes time involved in accessing studies in additional systems and potential for costly retesting	<ul style="list-style-type: none"> • Delivers a graphical, panoramic, chronological overview of your patients' cardiovascular care continuum to help you enhance the quality of cardiac care • The Cardiology Timeline also serves as a launch pad to detailed clinical records • Provide clinicians with easy access to prior cardiovascular exams to help reduce unnecessary and costly retesting
Multi-modality Workspace	Provides a single cardiology workspace with immediate access to all relevant cardiovascular information	<ul style="list-style-type: none"> • Organize day with user centric layer by creating a customized worklist to filter information needed • Access graphical study list within with in search and worklist applets • Access patient information from a single workspace • Complement your EMR • Work with medical devices from a variety of vendors • Zero-footprint technology; Accessible anytime, virtually anywhere • Compare multi-modality images and/or documents side by side • Launch directly into third-party applications for more information
Zero Footprint Workspace with web-based echo reporting accessible anytime, virtually anywhere	Access full diagnostic quality images via the web.	<ul style="list-style-type: none"> • Web based echo reporting anytime, virtually • Fulfills the need to analyze echo images and create and finalize echo reports remotely • Provides diagnostic quality echo images, including the ability to perform measurements and calculations • Generate a report using user configurable templates • Zero Footprint reduces client deployment needs and costs and can allow access to application from anywhere
EMR Integration	Launch from EMR into IntelliSpace Cardiovascular/Xcelera and from IntelliSpace Cardiovascular into EMR	<ul style="list-style-type: none"> • Vendor agnostic towards EMR's • Launch directly from your EMR into IntelliSpace Cardiovascular • Procedure/patient context – images and documents are automatically selected and displayed in the Image and Document Viewer applets • Use the EMR/HIS interface to access IntelliSpace Cardiovascular when working in your EMR/HIS system

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Cardiovascular: attack strategy

Features	Advantages	Benefits
Epic Cupid integration	Facilitates reporting via Epic Cupid. Allows image analysis and measurements from Intellispace Cardiovascular to be sent to Epic Cupid for inclusion in the report	<ul style="list-style-type: none">• Enables context synchronization for the user, patient, and study and near real-time transfer of measurements and calculation of results created in IntelliSpace Cardiovascular to the epic Cupid application• Helps to decrease error by eliminating manual input of measurements and calculation results into Epic
Expanded Web API	Launch into third-party applications from the ISCV workspace.	<ul style="list-style-type: none">• 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• Multiple URLs per modality provide flexibility to use multiple applications for one modality• Easy access to third-party applications not in patient or study context• Easy access to other applications such as Advanced Analytics, your scheduling system, or your ECG worklist• Streamline workflow by having access to multiple third-party applications in patient context such as hospitals which use more than one EMR
Advanced analytics	Advanced Analytics tool helps dig deeply into data from various clinical and administrative systems.	<ul style="list-style-type: none">• Examine data across your patient population for trending purposes; Quickly identify trends to support improvement of hospital workflows; Uncover opportunities for enhancing procedural efficiency;• Use report templates for common reports• Drill down further into individual patient data across patient population• Access supply utilization and productivity and outcomes reporting• Use a single industry-standard Microsoft reporting services tool to access data stored by IntelliSpace cardiovascular applications• Accessible via internet explorer or via the Web API• Distribute scheduled reports automatically
Diagnostic Guidance	Supports reporting confidence and accuracy	<ul style="list-style-type: none">• Operates during reporting to warn you of conflicts, errors, omissions, or patterns that would otherwise go unreported or mistakenly reported• 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• Create comprehensive reports that aid in confident and efficient decision-making when developing treatment plans• Helps you meet reporting standards and accreditation requirements the first time with confidence

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Cardiovascular: defend strategy (1 of 2)

Change Healthcare's claim	Additional details	Philips response
Seamless data sharing between Radiology and Cardiology	CVIS can be launched from within the McKesson Radiology environment creating a true Enterprise Imaging solution	<ul style="list-style-type: none"> Philips CVIS integration goes beyond Radiology with Philips IntelliSpace Enterprise Edition which integrates Philips IntelliSpace portfolio into a scalable, modular and interoperable solution for clinical informatics and data management for demanding, and growing healthcare enterprises The end-to-end managed service for healthcare IT, with pay-per-use financing and built-in risk sharing, this ultimately enhances operations and offers optimized and transparent total cost of ownership
Full integration within Cardiology department	<p>McKesson Cardiology™ is designed from the ground up to bring together all of the information you need into a single platform—a true cardiovascular information system (CVIS). In fact, ours is the industry's only cardiovascular information system designed to feature a single database design for:</p> <ul style="list-style-type: none"> • Cardiac and peripheral catheterization • Electrophysiology reporting • Hemodynamics monitoring • Echocardiography • Vascular ultrasound • Nuclear cardiology • ECG/stress/holter management 	<ul style="list-style-type: none"> IntelliSpace Cardiovascular offers advanced visualization and quantification with embedded tools and/or direct integration: <ul style="list-style-type: none"> • Cardiovascular X-ray - LVA, QCA, QVA, and vascular processing • Echocardiography – Philips QLAB and/or TomTec (Philips owned) • Nuclear cardiology – AutoQuant Plug-in and/or IntelliSpace Portal Beyond the standard Imaging modalities IntelliSpace cardiovascular can acquire documentation and reports from sub-specialty systems and store as PDF for a more complete view into a Patients Cardiovascular history IntelliSpace Cardiovascular can be tightly integrated to 3rd party systems via its Web and 3rd party API capabilities - such as Medstreaming and GE MUSE

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Cardiovascular: defend strategy (2 of 2)

Change Healthcare's claim	Additional details	Philips response
Cardiovascular Imaging and Reporting Via the Web	McKesson Cardiology™ offers cardiologists, administrators and other care givers safe, secure anywhere/anytime access to advanced cardiovascular image review and reporting capabilities for echo, vascular, cath, electrophysiology, nuclear medicine and ECG procedures over the web. The result is improved quality of care, a boost to departmental efficiency and an increase in referring physician and staff satisfaction.	<ul style="list-style-type: none">• IntelliSpace Cardiovascular's Zero Footprint workspace provides access to relevant cardiovascular images and information anytime, virtually anywhere• Provides access to the same user interface either inside or outside the hospital walls• Offers structured echo reporting with ability to perform measurements, use finding codes, perform wall motion scoring, etc.• Provide access to cardiovascular images and documentation throughout the Enterprise with no need for deployment of Software or special client configuration requirements• Ability to access Cardiology timeline allows for quickest possible viewing option into each patients comprehensive cardiac history
Customizable Reporting	McKesson Cardiology™ offers tools for the cath and electrophysiology labs, echo and vascular departments, nuclear cardiology department and ECG department make it possible for users to quickly document and analyze care practices	<ul style="list-style-type: none">• IntelliSpace Cardiovascular offers highly customizable structured reporting and measurement capabilities• In addition to highly customizable reports, IntelliSpace Cardiovascular offers Diagnostic Guidance for Echo reporting. Diagnostic Guidance improves the quality and completeness of reporting and minimizes the potential for errors by alerting the user to critical errors and missing information prior to finalizing• IntelliSpace Cardiovascular integrates directly with its own solutions such as Xper IM, a complete Interventional Management, Monitoring, Charting and Reporting solution and IntelliSpace ECG.• Intellispace Cardiovascular offers several ways to integrate to 3rd party systems using HL7 and DICOM SR standards to obtain data from disparate systems in order to achieve a comprehensive cardiovascular record.

Selling against Change Healthcare (formerly McKesson)

KLAS insights: Cardiology informatics

Overall KLAS Score:
Philips 78.5
 McKesson 74.0

Category	Ranking	Insight
Sales and contracting: Philips stronger than Change Healthcare	<p>Avoids charging for everything: PHILIPS = 78.2 vs CHANGE HEALTHCARE = 64.8%</p> <p>Sales and contracting category: PHILIPS = 77% vs CHANGE HEALTHCARE = 44%</p>	<ul style="list-style-type: none"> Philips provides a wide range of custom configurations and service solutions to address both current and future customer requirements Philips offers customers a product structure that empowers the customer to tailor the solution to their needs. The result is the customer is not burdened to make additional investments in functionality that does not add value to their daily workflow McKesson touches virtually every aspect of healthcare and capitalizes on their EMR position – they win because the hospital IT department is pushing for one solution and they are deeply engrained into hospital IT and purchasing, as well as having a solid C-level engagement
Implementation and training: Philips stronger than Change Healthcare	PHILIPS = 83.3 vs CHANGE HEALTHCARE = 73.2	<ul style="list-style-type: none"> Philips dedication to its customers is expressed through the investment made to the training and implementation programs, leaving customers with a positive experience
Functionality and upgrades: Philips and Change Healthcare equal ranking	PHILIPS = 78.6 vs CHANGE HEALTHCARE = 78.2	<ul style="list-style-type: none"> Philips and McKesson have similar customer commentary in this category. Customers equally enjoy the flexibility of the solutions and are excited for future functionality coming in the latest versions of each respective solution McKesson customers would like to see less nickel-and diming and better interfacing with Cerner and Epic. These concerns have resulted in a downward trend of overall satisfaction with McKesson Cardiology during the last 12 months
Service and support: Philips stronger than Change Healthcare in both categories	<p>Quality of support PHILIPS = 7.1 vs CHANGE HEALTHCARE = 7.1</p> <p>Keeps all promises: PHILIPS = 79% vs CHANGE HEALTHCARE = 72%</p>	<ul style="list-style-type: none"> Philips makes every effort to proactively address customer issues, however a continued theme with customer feedback is that Philips need to focus more on Service and Support by providing more emphasis on customer experience by effectively problem solving in a timely manner
General: Philips stronger than Change Healthcare	PHILIPS = 79.5 vs CHANGE HEALTHCARE = 75.7	<ul style="list-style-type: none"> Philips has a strong reputation for investing in innovation and internal resources that result in more satisfied customers and greater adoption than McKesson in this category

Selling against Change Healthcare (formerly McKesson)

XPER IM/Flex: Attack Strategy

Features	Advantages	Benefits
Clinical decision support	Empower caregivers in the cardiac cath lab area to make fast, informed clinical decisions wherever care is delivered	<ul style="list-style-type: none"> Advanced clinical decision support <ul style="list-style-type: none"> FFR, ETCO2 Supports patient care pre-procedure, during the procedure and in recovery <ul style="list-style-type: none"> Xper Bedsides, Xper IM interface with PIIC iX IntelliVue; Xper IM interface with Epic CUPID Support quality and accreditation initiatives <ul style="list-style-type: none"> NCDR Cath PCI charting menus, dedicated CathPCI template, Clinical discreet data interface Meet internal and external compliance objectives <ul style="list-style-type: none"> Q & A reporting with data analysis module.
Streamline clinical workflows	Orchestrate and facilitate collaboration across specialty teams with rich panoramic patient impressions	<ul style="list-style-type: none"> Ease of use and customizable to both clinical & operation your needs <ul style="list-style-type: none"> Customized charting menus, custom forms, physician report templates Cath lab inventory management, cath lab data analysis Provides multi-facility support through unified access, data/ information and performance through an enterprise <ul style="list-style-type: none"> Single stand-alone, multi-facility enterprise; Single or multiple database repositories IntelliBridge Enterprise Proactive support to reduce downtime
Maximize return on healthcare IT investment	Drive provider reimbursement with clinical and economic outcomes and comply with standards of care and the consumerization of the cath lab area	<ul style="list-style-type: none"> Increased ROI through understanding operational efficiencies <ul style="list-style-type: none"> Xper Inventory module with bi-directional interface Xper Cath Lab Data Analysis module Xper Billing & Coding module supports of billing workflow through management and association of coding standards (ICD 10 and CPT) Provides the most scalability with the least amount of incremental costs (# of labs, users etc) <ul style="list-style-type: none"> Xper concurrent licenses, Xper Data Center; Upgrade to continue investment Complies with industry standards and provides adaptive architecture that can be deployed in enterprise infrastructure <ul style="list-style-type: none"> Xper Data Center, Windows 10, Windows Server 2014, SQL 2012 Xper Connect (Over +900 live interfaces, IntelliBridge Enterprise)

Selling against Change Healthcare (formerly McKesson)

Xper IM/Flex Cardio defend strategy

Change Healthcare's claim	Additional details	Philips response
<p>McKesson Cardiology Hemo – integrated hemodynamic monitoring system aggregating hemodynamic data, waveforms and images in one cardiac patient record</p>	<p>McKesson Cardiology™ Hemo solution is a comprehensive hemodynamic monitoring system and information management application for cardiac, peripheral and EP procedures. Patient demographics, medication information, hemodynamic waveforms, fractional flow reserve (FFR) measurements, images and procedural information all flow seamlessly into one complete patient record. The result – repetitive data entry is eliminated and information is intuitively accessible from any location.</p>	<ul style="list-style-type: none"> Philips Xper IM with Xper Flex Cardio is a complete monitoring and documentation solution for interventional labs and presents a variety of innovations for reporting, scheduling, inventory and intelligent data management. With tools that enhance efficiency on multiple levels, the solution improves and simplifies workflow for cardiology professionals Xper portfolio continues to add clinical decision support features to enhance the continuum of care from the holding area to the cath lab. Examples of this include: <ul style="list-style-type: none"> Philips Volcano FFR St. Jude FFR ETCO2 Interface with PIIC iX/IntelliVue in holding area for arrhythmia detection. As a full line vendor, Philips also offers tight integration with its Xray Systems, Patient Monitors, and Image Guided Therapy solutions
<p>McKesson Cardiology Cath Cardiovascular image and information management for the cath lab.</p>	<p>The McKesson Cardiology™ Cath solution is a patient-centric cardiac imaging solution and information management system for catheterization labs. The integrated cath lab solution allows your hospital to manage the complete periprocedural workflow of the cath environment.</p>	<ul style="list-style-type: none"> Philips offers direct integration between IntelliSpace Cardiovascular and Xper IM. Provides access to a patient's multi-modality record, waveform measurements, and reports for a complete case review. These functions are part of the Xper solution Xper IM with Xper Flex Cardio. Xper customers can grow with the system & add-on/upgrade to workflow modules or interfaces to improve efficiencies using Xper IM (i.e. Inventory, Physician Reporting, Analytics etc) The Xper portfolio continues to add innovation based on customer feedback and industry standards: Bi-direction Inventory, PIIC iX (IntelliVue) interface, Real-time labs, Billing Coding ICD10, Nuance PowerScribe interface, expanded integration with IntelliSpace CV signal sign-on with Xper, Xper IM interface to Epic CUPID for meds, staff & events, ; WIN10, WIN Server 2012 or 2014, SQL Server 2014.

Source <http://www.mckesson.com/providers/health-systems/department-solutions/cardiology/mckesson-cardiology-hemo/>
<http://www.mckesson.com/providers/health-systems/department-solutions/cardiology/mckesson-cardiology-cath/>

Selling against Change Healthcare (formerly McKesson)

KLAS insights: Cardiology informatics - Xper IM/Flex Cardio category

Overall KLAS Score:
Philips 75.6
McKesson 81.2

Category	Ranking	Insight
Sales and contracting: Philips high satisfaction rating over McKesson	<p>Avoids charging for everything: PHILIPS = 73% vs CHANGE HEALTHCARE = 45%</p> <p>Sales and contracting category: PHILIPS = 75.2 vs CHANGE HEALTHCARE = 68.6</p>	<ul style="list-style-type: none"> Philips offers installed base customers upgrade & trade-ins along with promotional incentives to latest technology Philips sales & service consult with customers to provide solutions that fit their needs Change Healthcare has a relatively low market share of 7% compared to Xper's 36% and GE 37%. Historically, Change Healthcare will not win a Hemo deal unless they get the CPACS/CVIS side as well
Implementation and training: Philips surpasses McKesson in this category	PHILIPS = 83.3 vs CHANGE HEALTHCARE = 71.1	<ul style="list-style-type: none"> Philips tailored approaches to implementation and value added services out pace what Change Healthcare delivers (in contrast to what they promote) McKesson's ability to sell cardiology beyond its customer base, due to interoperability issues when implementing, is a weakness that customers have noted
Functionality and upgrades: Philips ramping up innovation	PHILIPS = 75.4 vs CHANGE HEALTHCARE = 82	<ul style="list-style-type: none"> It is important to remind customers of all the new innovations we have released with Xper IM Philips users now feel like they are heard and their input is converted into change
Service and support: McKesson slight lead	<p>Quality of support PHILIPS = 7.2 vs CHANGE HEALTHCARE = 8.1</p> <p>Keeps all promises: PHILIPS = 78% vs CHANGE HEALTHCARE = 81%</p>	<ul style="list-style-type: none"> Philips has earned a strong reputation of clinical & technical support and does right by the customer Philips has excellent trainers. Philips works very hard to retain and train their trainers Ability to work with and interface with other vendors is a core strength of Philips
General: McKesson leads Philips due to their upgrades.	PHILIPS = 75.2 vs CHANGE HEALTHCARE = 86.1	<ul style="list-style-type: none"> McKesson customer loyalty very high, but may drop now that Change Healthcare is the new brand Be confident that customers do value our people, our technology and our service to our clients

Selling against Change Healthcare (formerly McKesson)

IECG: attack strategy

Features	Advantages	Benefits
ECG Anywhere web based client	Zero-footprint solution allowing Cardiologists to access multiple IECG systems, facilities.	<ul style="list-style-type: none">• Philips provides secure access to ECG information from anywhere on different devices• Web client compatible with HTML5 browsers – nearly universal access from wide-range of common devices and viewers is a key point to make• We have ability to review, edit, and confirm from remote viewers, including non-Philips ECGs• We can Link multiple IECG systems, facilities, and all locations from a single web-client• Enables both Analysis and Serial comparison functions to utilize powerful IECG• We can un-confirm, analyze, and run serial comparisons
DXL Algorithm	Provides precise and consistent ECG measurements to generate interpretive statements	<ul style="list-style-type: none">• Filtering to identify critical data• Determines discrete measurements• Compliance with ACC/AHA/HRS guidelines (STEMI, NSTEMI, Pacemakers)
Statement editing	Frequently used statements are easily accessible by individual users	<ul style="list-style-type: none">• Provides flexibility to choose desired methods for search and inserting diagnostic statements• Fully configurable and customizable statements by disease category• IECG automatically tracks usage history and provides a list of the last 20 statements inserted for easy and quick access• Support for billing codes
Multi-level over-reading workflow	Supports two roles in over-reading workflow to provide training tool for cardiology fellows in teaching institutions while lightening the reading task for cardiologists	<ul style="list-style-type: none">• Supports two roles in Approve/Confirm over-reading workflow• Provides training tool for cardiology fellows while lightens the reading task for cardiologists• Accelerates workflow and improves clinical outcomes where ER doctors read and interpret complex ECGs and cardiologists review and confirm initial interpretation

Selling against Change Healthcare (formerly McKesson)

IECG: attack strategy

Features	Advantages	Benefits
Full integration of IECG and Philips ST80i stress systems	Centrally store Philips Stress report and study data, provide ability to edit stress report, and integrate custom workflow	<ul style="list-style-type: none">• IECG is fully integrated with Philips ST80i stress system and centrally stores stress reports and study data, enabling a transition to digital workflow• Single point-of-entry to increase efficiency and improve patient outcomes with all patient studies and procedure data• Ability to edit the stress PDF report in IECG
IECG cover page process	Allow reviewing cardiologists to edit preliminary diagnostic information in Holter and ST80i PDF reports including “Narrative Summary” and “Interpretation	<ul style="list-style-type: none">• Provides a configurable list of commonly used diagnostic phrases that can easily be included in the cover page• Read the “Narrative Summary” and “Interpretation” from meta data in Holter or Stress PDF reports and fill in the pdf cover page automatically when the report is opened
Connectivity	Flexible infrastructure requirements to ease deployment in your IT environment	<ul style="list-style-type: none">• Supports industry standard interfacing via HL7, DICOM, and IHE• Two-way data exchange between IntelliSpace ECG and clinical and administrative systems• Interfaces with both Philips and Non-Philips diagnostic ECG applications

Selling against Change Healthcare (formerly McKesson)

IECG: defend strategy

Change Healthcare's claim	Additional details	Philips response
Web-based reporting of rest, stress, and holter ECG Management	Designed to provide anytime, anywhere access McKesson Cardiology™ ECG Management software is a web-based system that provides a comprehensive solution for 12- or 15-lead resting ECGs, and supports stress and holter procedures as well. These ECGs are received from a multi-vendor list of carts, patient bedside monitors, stress machines and holter analysis stations. ECG Management software can interpret rest ECG procedures to produce diagnosis statements and measurements, or you can choose to utilize the cart based interpretations. Smart workflow tools streamline the administration and clinical over-reading of ECGs while automatically distributing results across the enterprise.	<ul style="list-style-type: none"> Philips ECG Anywhere web based solution provides similar functionality to McKessons web based solution. iECG also provides secure access to ECG information from anywhere on different devices. This technology allows cardiologists the ability to review, edit and confirm from web client compatible HTML5 browsers. Linking multiple iECG systems, facilities and locations from a single web-client. McKesson does not have its own algorithm such as Philips DXL algorithm. Customers with a fleet of cardiographs from various MFG's would benefit from iECG and its ability to apply the DXL algorithm regardless of cardiograph vendor. Since McKesson relies on the interpretations of the carts customers with multiple cart vendors would not have access to a universal algorithm.
Native stress interface with Horizon Cardiology	Stress interface supports out-of-the box mapping of protocol data such as stress type, termination reason and date of study. The patient's standing heart rate, blood pressure, stress mets and other discrete elements are mapped into the report field for rapid report generation.	<ul style="list-style-type: none"> The release of AT80i A.02 provides more than just field mapping. IECG is now fully integrated with Philips ST80i A.02 stress system. iECG not only centrally stores stress reports and study data the system allows cardiologists the ability to edit the stress PDF report in IECG by invoking the full functional Stress report editor from within IECG enterprise wide.
Smart workflow tools streamline the administration and clinical over-reading of ECGs while automatically distributing results across the enterprise.	ECGs are received from a multi-vendor list of carts, patient bedside monitors, stress machines and holter analysis stations. ECG Management software can interpret rest ECG procedures to produce diagnosis statements and measurements, or you can choose to utilize the cart based interpretations. Single-click comparison of current and historical ECG exams.	<ul style="list-style-type: none"> iECG provides serial comparison for ECGs sourced by Philips and non-Philips devices that meet standard format requirements (minimum 12 leads for 10 seconds, 500 samples per second) iECG also supports two roles in over-reading workflow. This workflow is beneficial to teaching institutions, ER departments and can also be used as a training tool.

Source: http://www3.gehealthcare.com/en/products/categories/healthcare_it/medical_imaging_informatics_-_ris-pacs-cv/is/centricity_cardio_enterprise#tabs/tab8D0752DA8EB04D4394548174402B9AA1

Selling against Change Healthcare
(formerly McKesson)

Advanced visualization

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Portal: attack strategy – business model (Target audience - CFO)

Features	Advantages	Benefits
Single Advanced Visualization platform, spanning clinical domains and modalities	All-inclusive contract with transparent total cost of ownership	<ul style="list-style-type: none"> • Reduces the costs and risks of system acquisition • Known and predictable costs for the period of the contract (Predictable budgeting) • Financially aligned incentives for growth • Built in on-demand scalability allowing you to add users, workstations, modalities, exams, applications, and facilities as needed • Includes software upgrades and hardware obsolescence protection • Supports continual innovation throughout your investment
Subscription or fee-per-service model	Operational expense vs. capital purchase	<ul style="list-style-type: none"> • Align spend directly with usage (CIO/CFO/Management) • Business model flexibility depending on the customer's financial situation and needs
Proactive service and support	Rapid response to issues at any time.	<ul style="list-style-type: none"> • Faster resolution of issues and focus on the customer's business goals, which leads to more efficient patient care. Our standard proactive service includes: <ul style="list-style-type: none"> • 24x7x365 Proactive monitoring system with Live Tech Support • Support services included in all contracts
Open platform for integration with third-party solutions	Easily interface with a broad range of modality vendors, 3 rd party and customer developed solutions	<ul style="list-style-type: none"> • Choice of best of breed tools from Philips, third-party vendors, and homegrown • Allows you to design and customize your environment based on your specific needs, leading to increased workflow efficiency and productivity
Enterprise Imaging Platform	Manages a wide array of patient images and data in a secure, standards-based environment	<ul style="list-style-type: none"> • Common viewing platform for enterprise imaging needs, including Radiology, Cardiology, Oncology, Neurology, etc.

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Portal: attack strategy – clinical workflow (Target audience - Department chair)

Features	Advantages	Benefits
Advanced Workflow Orchestration	Empowers radiologists to manage their work more efficiently	<ul style="list-style-type: none"> • Empower your radiologists to meet specific clinical and business goals, and better server the referring community • Reduce or even eliminate the need for (costly) 3rd party workflow orchestration solutions
Clinical intelligent software, leveraging Adaptive Intelligence and Machine Learning	It augments the skills of your clinicians, redefining how they currently interface with images	<ul style="list-style-type: none"> • Delivers a tailored workflow experience, as it adapts to the context and to the user preferences • Assist physicians with best practices to help standardize care • Produces a more meaningful, insight-rich output that can help physicians get to the right decision for their patients and improve care • Improves collaboration between departments within the hospital and with referring physicians
Oncology - Multimodality Tumor Tracking - MMTT	Streamlined solution with exclusive qEASL biomarker	<ul style="list-style-type: none"> • Seamless radiologist reading workflow with digital tools designed for diagnostics and follow-up reviews • Quantitative reports based on Oncology standards with seamless integration to PowerScribe 360 • Exclusive qEASL biomarker to evaluate viable tumor tissue instead of tumor size for more accurate treatment results
Cardiology - TAVI	Streamlined solution to guide TAVI interventional procedure	<ul style="list-style-type: none"> • Semi-automatic segmentation of the heart and vascular structures necessary to plan a TAVI procedure. • Iliac artery assessment embed into the TAVI application • Results achieved in half the time of traditional solutions
Neurology - MR Longitudinal Brain Imaging and MR Comparative Brain Imaging LoBI and CoBI	Exclusive streamlined workflow solution to address Multiple Sclerosis studies evaluation	<ul style="list-style-type: none"> • Intelligent clinical workflow provides a seamless user experience, reducing the reading time to half of traditional methods for multiple sclerosis using LoBI and CoBI
Fully integrated within PACS workflow	Single workspace to address all clinical needs	<ul style="list-style-type: none"> • Launch relevant clinical applications from a single workspace, increasing workflow and productivity • Reduce number of workstations, and associated costs and resources needed to support, maintain, upgrade, route and pre-fetch studies to disparate workstations
Results reporting	Direct integration with PowerScribe 360 or HL7 integration with other dictation systems.	<ul style="list-style-type: none"> • Quantitative results and tables will populate PS360 or other dictation systems with a single click • No need to dictate quantitative results

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Portal: attack strategy – infrastructure (Target audience - CIO)

Features	Advantages	Benefits
Scalability	Using a floating license model, unlimited number of clients and user access to the system with a maximum of 100 concurrent users	<ul style="list-style-type: none">• Using the Philips Concerto technology, we have a true enterprise solution that can cover up to 100 CU from different locations and specialties.• Even though solution is deployed across multiple locations and specialties a common global worklist is available
Virtual environment	We can deploy our Advanced Visualization as a software only solution, leveraging the customer owned data center as a host	<ul style="list-style-type: none">• Virtualization also available for clients via CITRIX.• Solution fully supports up to five PACS solutions within one “Concerto” environment
Open platform for interoperability with 3 rd party solutions	Easily interface with a broad range of PACS, EMRs, third-party and customer developed solutions	<ul style="list-style-type: none">• Choice of best of breed tools from Philips, 3rd party vendors, and homegrown• Design and customize individual environments based on specific needs for improved efficiency and productivity

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Portal: defend strategy

Change Healthcare's claim	Additional details	Philips
<p>McKesson Radiology PACS</p> <p>Picture archiving and communication system (PACS) enables hospitals and clinics to acquire, distribute and archive medical images and diagnostic reports across the enterprise</p>	<p>Our comprehensive PACS system includes:</p> <ul style="list-style-type: none">• VTRIP - Variable Thickness Regional Intensity Projection – Volumetric CT and MR viewing across the enterprise.• Volumetric CT and MR Solutions• Teaching File Solutions/Study Share• McKesson Radiology Collaboration• Improved Enhancements Program: 30 day turnaround on enhancement requests* <p>Optional add-on solutions:</p> <ul style="list-style-type: none">• Native Mammography Solutions• McKesson Radiology Analytics	<p>Philips can offer a core vendor strategy with our integrated solutions.</p> <p>Philips IntelliSpace Portal has over 70 applications to support the clinical diagnosis of the most complex studies in Oncology, Cardiology, Neurology and other specialties and also CT, MR, AMI, US, iXR and DXR</p> <p>Philips clinical richness is based on a solid clinical science organization across the globe working collectively to enable the delivery of native advanced visualization on PACS.</p> <p>With Change, all AV solutions are provided by 3rd party solutions and customer would have to learn 2 or 3 different user interfaces and deal with multiple service contracts</p> <p>Philips clinical depth and scalability across the care continuum</p> <p>Philips is fully integrated with PS360 and also integrated with other dictation systems via HL7</p> <p>Because of the lack of clinical depth within the McKesson Radiology PACS, every time their PACS is sold, it needs a 3rd party integration for Advanced Visualization</p> <ul style="list-style-type: none">• Most of the McKesson Radiology PACS systems are integrated with Vital• Some of the McKesson Radiology PACS systems are integrated with TeraRecon

Selling against Change Healthcare (formerly McKesson)


IntelliSpace Portal: strategy against PACS w/ Vital

	Competitor V i T A L	Philips
Solution(s)	Vitrea Advanced Visualization	IntelliSpace Portal
Value Proposition	Vitrea® software is a multi-modality advanced visualization system providing comprehensive applications in a variety of IT environments.	Philips IntelliSpace Portal 9.0 is an advanced visualization platform that offers a single integrated solution to help you work quickly with increased diagnostic confidence – especially for complex cases and follow-up.
Strengths	Basic GUI very friendly. CT Brain Perfusion 4D, CT Body Perfusion 4D, Vitrea Image denoising, TomTec integration for US, Olea Sphere MR integration, Medis for Cardiac MR, Mirada Oncology Fusion, iCAD CT Colon, Visia/Mevis CT Lung CAD	Clinical depth across the care continuum and scalability to up to 100 concurrent users in multiple locations.
Weaknesses	Multiple additional GUI	Delivering “Best of Breed” AMI solutions, no CAD solutions for colon or lung. Service pricing twice as Vital.

Sales strategies	
Attack (Net new customers)	Defend (Protect existing customers)
Lack of native applications Complex licensing model for CU depending on third-party No monthly subscription model	Inconsistent organization Recently bought by Canon Operate separately from Canon Sell Philips – large sales and service support organization

Selling against Change Healthcare (formerly McKesson)

IntelliSpace Portal: strategy against PACS w/ TeraRecon

	Competitor 	Philips
Solution(s)	iNtuition	IntelliSpace Portal
Value Proposition	We can provide an impressive range of clinical tools and deliver a remarkable clinical experience. On your PACS, off your PACS, within the surgical suite and beyond, iNtuition ensures your workflow is seamless and your imaging costs are minimized. It's no secret that TeraRecon was the first to introduce the first truly scalable and impressively intuitive solutions.	Philips IntelliSpace Portal 9.0 is an advanced visualization platform that offers a single integrated solution to help you work quickly with increased diagnostic confidence – especially for complex cases and follow-up
Strengths	Ability to respond to customization request and create one-offs to meet customer specific needs (i.e. export of discreet data)	Clinical depth and scalability across the care continuum
Weaknesses	Weak implementation and post-sale support	Delivering “Best of Breed” AMI solutions

Sales strategies	
Attack (Net new customers)	Defend (Protect existing customers)
Limited clinical applications Relies on third-party solutions for NM and others	True multi-modality, multi-specialty solution About 80 clinical applications as part of the solution

Selling against Change Healthcare (formerly McKesson)

KLAS insights: Advanced Visualization category

From a KLAS ranking standpoint, Change Healthcare is NOT even ranked because they do not offer a competitive Advanced Visualization solution. Philips provides solutions that should be considered in a customers core vendor strategy.

Overall KLAS Score:	
Philips	83.8
Change	0

Category	Ranking	Insight
Sales and Contracting	Sales and contracting PHILIPS = 84.3% vs CHANGE HEALTHCARE = 0% (Advanced Visualization average =79.6%)	“IntelliSpace Portal hasn’t produced any issues. It is a good-quality product, and we get excellent support because of our location. We are happy with IntelliSpace Portal. We haven’t seen the dust settling on the executive involvement yet with a lot of changes that have happened. The top people are very good, but the executive that traditionally dealt with us is still in flux. details here”
Functionality and upgrades	Functionality & Upgrades PHILIPS = 83.8% vs CHANGE HEALTHCARE = 0% (Advanced Visualization average =79.8%)	“We use several workstations, some of which are from niche players. The Philips product is used more than our other system and principally in our 3D lab. I think our other system mostly gets used for dual-energy things. I know our people who do CT colonography or mapping of livers and tumors for transplantation prefer Philips’ system. There are a few things that IntelliSpace Portal seems to be better at, and that is why it is preferred.”
Implementation and training	Implementation & Training PHILIPS = 81.2% vs CHANGE HEALTHCARE = 0% (Advanced Visualization Average = 79.5%)	“IntelliSpace Portal has been really good for us, and we have slowly moved away from some of the other vendors because Philips has a lot of functionality and tools for specialty areas. Overall the portal has been a good solution, and Philips has done a good job of supporting it and asking for our feedback. We hope to consolidate vendors in the future and when we look at all of the vendors we have, I believe Philips and one other vendor show the strongest results and probably have a broader reach than some of the others. dd details here”
Service and support	Service & Support PHILIPS = 83.2% vs CHANGE HEALTHCARE = 0% (Advanced Visualization average =79.3%)	“IntelliSpace Portal is what it is. I haven't really thought of any ways that it could be improved. The support is excellent. Anytime I need something, the support representatives are there, and they are knowledgeable. They know what they are doing in terms of nuclear medicine. I have never gotten off the phone with a support person and then still had the problem. The support people always take care of the problem over the phone, and they are always able to help me fix any issues I have with the product.”
Overall	Part of long term plans: PHILIPS = 84.4% vs CHANGE HEALTHCARE = 0% (Advanced Visualization average = 81.7%)	“IntelliSpace Portal has been really good for us, and we have slowly moved away from some of the other vendors because Philips has a lot of functionality and tools for specialty areas. Overall the portal has been a good solution, and Philips has done a good job of supporting it and asking for our feedback. We hope to consolidate vendors in the future and when we look at all of the vendors we have, I believe Philips and one other vendor show the strongest results and probably have a broader reach than some of the others.”

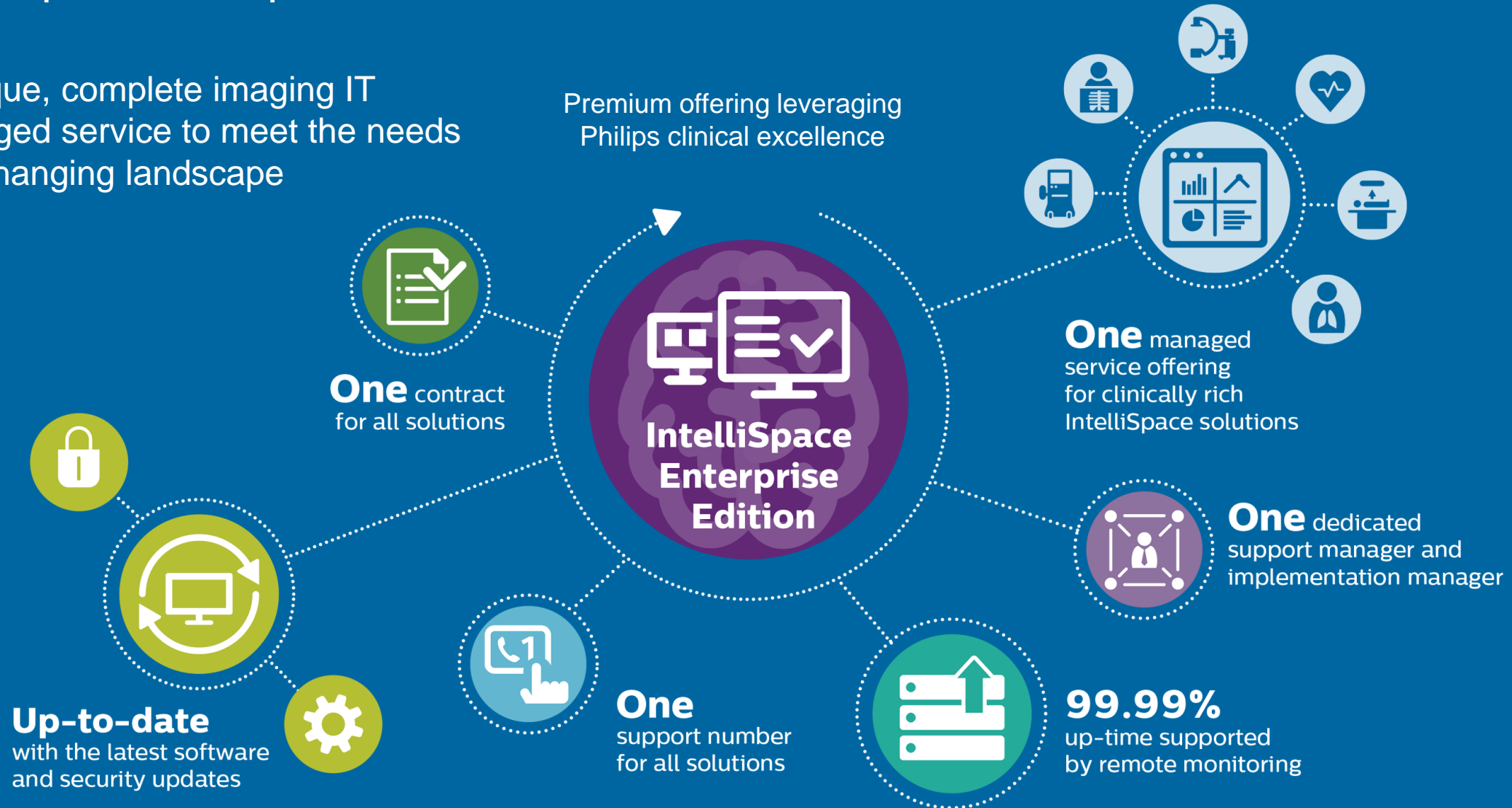
Source: snapshot report from KLAS website, August 22, 2017

Selling against Change Healthcare
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IntelliSpace Enterprise Edition

IntelliSpace Enterprise Edition

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

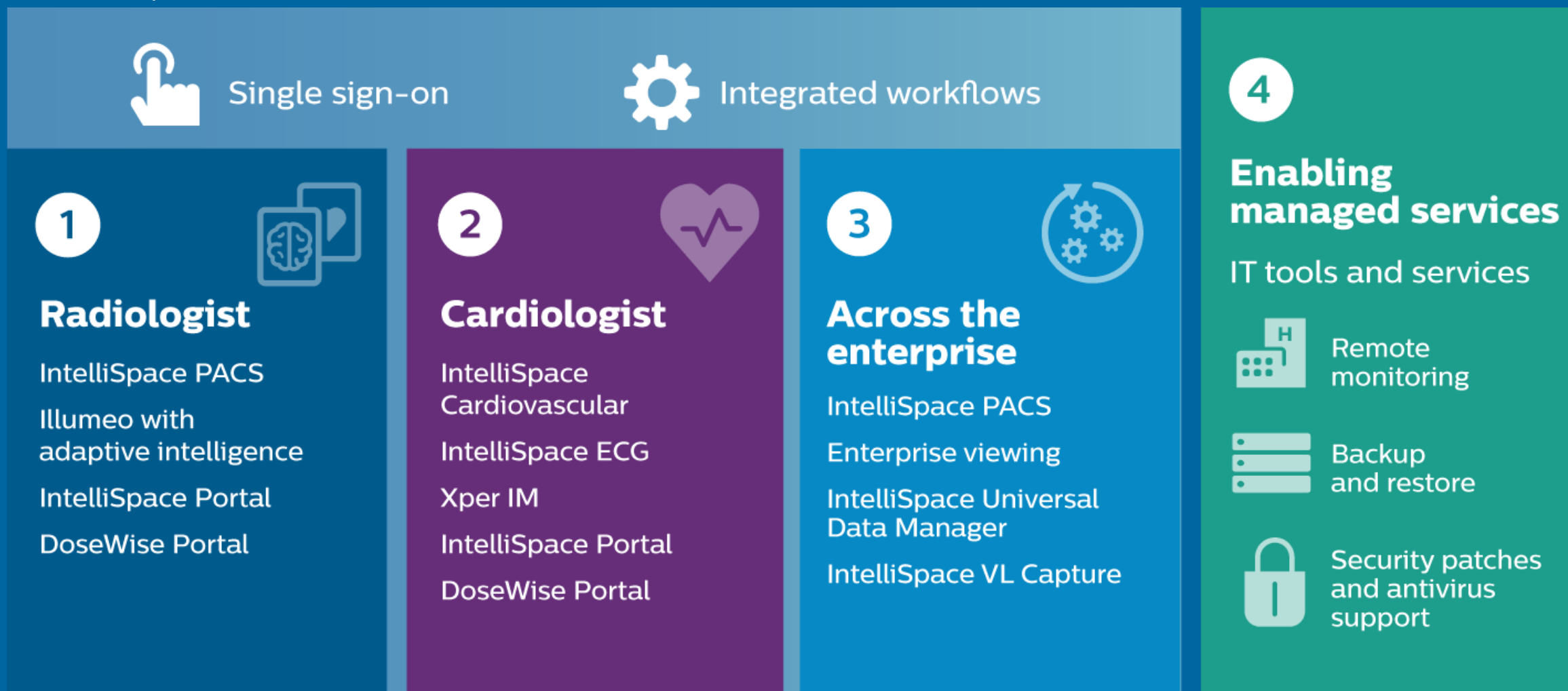


Aggregating and interfacing across the enterprise

IntelliSpace Enterprise Edition

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
Hardware	Cost optimized for short term; lower flexibility	Cost optimized for longer term (TCO focus)
Backup and recovery	Backup and recovery needs to be setup by the customer for each product	Full data backup to recover from fatal crashes
Proactive infrastructure monitoring and problem resolution	Infrastructure monitoring customer responsibility	Centralized remote monitoring of HW infrastructure to proactively identify and fix issues
Updating of anti virus and security patches	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
Domain management and SSO	Domain management is customer responsibility	Philips manages domain for all products to enable full SSO capabilities
Uptime guarantee (shared risk)	No uptime guarantees	99.99% uptime guarantees ensure risk sharing and proactive support
Contract setup	Different contracts for different products; difficult to scale	Fully harmonized contracts, making scalability (up and out) extremely easy
Post sales SoW experience	Product centric SoWs	Solution centric SoW; fully harmonized across products
Project implementation	Project teams for each product	Single solution implementation team
Service delivery: call center setup	Optimized for product support: lower customer intimacy, product centric intimacy	Optimized for solutions support: higher customer intimacy, dedicated TSE per customer; cross-product support
Service delivery: support process to resolution	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

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

Selling against Change Healthcare
(formerly McKesson)

Conclusion and recommendations

Conclusion and recommendations

- Philips provides a core vendor strategy that Change Healthcare cannot meet because of their reliance on 3rd party solutions to fill gaps in their portfolio. Philips is an EMR agnostic vendor where we meet the customer half way and work to integrate our data with other vendors in their organization. Philips has created several interfaces with key vendors in the EMR space like Epic to streamline workflow and eliminate double documentation
- Philips has a strong brand identity which Change Healthcare has yet to build. Many of their solutions, including McKesson PACS, McKesson Cardiology, and McKesson Cardiology ECG Management have yet to be rebranded to Change Healthcare
- Philips offers a much more attractive end-to-end solution when comparing against Change Healthcare. Our products, from IntelliSpace PACS Anywhere to IntelliSpace Portal, are developed in-house and provide a streamlined workflow with full access to the patient records. Change Healthcare must use third party solutions to get close to the depth of our offering, but it is still a disjointed system, with multiple databases, and different solutions and vendors
- Change Healthcare offers a complete Radiology PACS solution; complete with collaborative tools, mammography, and analytics. However, all their offerings are bundled on top of their PACS system, making for a complex contract where nickel and diming practices are encouraged. Philips IntelliSpace PACS offers a managed-service where the majority of our offerings are included; which builds trust through our transparency
- McKesson is well known across cardiology and radiology PACS markets, but very few providers have adopted McKesson's VNA and universal viewer
- A high number of McKesson and Philips respondents have plans to increase their physician adoption of structured reporting. McKesson's footprint in PACS and cardiology along with moderate improvement in structured reporting have helped drive the vendor's expansion. Delivery of new technology is still mixed
- From a KLAS standpoint, McKesson is beating us in a number of areas. However, Philips is on par or better than McKesson in the area we play most, large hospitals greater than 200 beds. Emphasize Philips clinical expertise as McKesson is not as strong as we are in this area. In the past, McKesson did have access to the C-suite so make sure to pitch the Healthcare IT Suite story and be aligned with your Account Executives and Regional Sales Managers on account strategy
- Philips is much further along than McKesson in the artificial intelligence space, making our roadmap a bit more compelling

Philips is a storied brand with innovative technologies and we should remind customers of this whenever going up against Change Healthcare.



Learn more

For more information, please go to www.philips.com/Intellispace