



SPINE TRAVELER

GLOBAL SPINE MARKET
OBSERVATIONS

MAYBE SOME LESSONS?

SPINE SURGICAL INNOVATION™

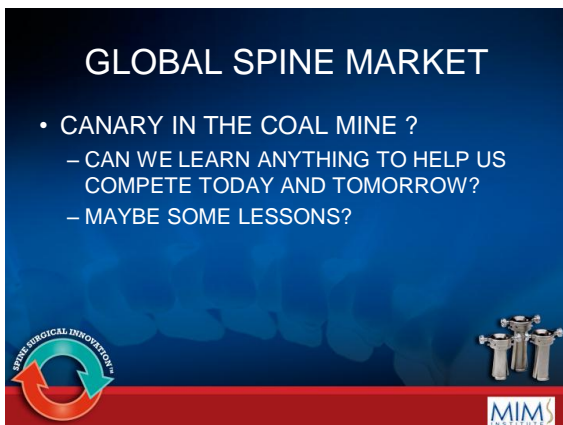
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SPINE SURGICAL INNOVATION™

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GLOBAL SPINE MARKET

- CANARY IN THE COAL MINE ?
 - CAN WE LEARN ANYTHING TO HELP US COMPETE TODAY AND TOMORROW?
 - MAYBE SOME LESSONS?

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GLOBAL SPINE MARKET

In civilized first world countries...

- Way ahead
- Similar outcomes
- Much lower costs, charges, and prices
- Less staff-less support
- Simpler approach in OR: prep, turnover, draping, instruments, equipment



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GLOBAL SPINE MARKET

- LARGE RANGE OF DIFFERENCE
- MANDATED PT, WAITING TIME AND QUEUES FOR SURGERY
- RATIONING IN PUBLIC HOSPITALS
- ALMOST NO OUTPATIENT SURGERY
- LOS LONGER
- MANDATED POST OP PT
- LESS PRESSURE



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80% LESS COSTS THAN US

- RESTRICTED AND CAPPED BUDGETS BY ANNUAL PROCEDURE FORECAST
- OFTEN UNBUNDLED
- INTENSE RESTRICTION OF RADIOGRAPHY AND STAFF
- PRETTY QUIET IN THE OR-few reps
- HIGHER THROUGHPUT OF CASES



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80% LESS COST?

• QUESTION?

- HOW LONG CAN THIS DIFFERENTIAL LAST IN THE STATES?
- PAYORS GRINDING YOU DOWN
- TAXPAYERS DON'T WANT TO AND CAN'T PAY
- IMPACT ON FEES AND PROFIT MARGIN?
- HOW CAN YOU PREPARE FOR THIS?



KEEP IT SIMPLE

- USE APPROACHES THAT ARE PROVEN, DEVELOP EXPERIENCE BASE
- BE CAREFUL OF THE NEXT BEST THING?
- DO YOU HAVE THE TIME TO LEARN AND GET PROFICIENT? See above
- HOW LONG WILL PAYORS PAY FOR ADDED COST AND SOPHISTICATION WHEN OUTCOMES ARE SIMILAR?



INCREASE PRODUCTIVITY

• EFFICIENCY X EFFECTIVENESS

- Pick your team well
- Incentivize performance
- Embrace simplicity
- Treat commodities as commodities
- Choose the right cases
- Use lower payors as your benchmark
- Constantly look for incremental productivity gains



ECONOMIC REALITY

- Its is less traumatic to you if you lead the way- not have to constantly react
- Today is history -Think about 2016 and 2021
- This can't go on- market disruptors
 - Vendors
 - Payors
 - Government



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POSITIONING

- Think of your ASC as a medical tourism destination?
 - New Jersey
 - Nevada
 - Illinois
 - What can they do for \$25,000 in Spain and Mexico that you can't do here?
 - Why?



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