

Dreamit

Healthcare Innovation Trends: What's Happening, Why, and What you Should be Doing About It

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Dreamit^{*} Venture Accelerator

9+

Years in
Business

~300

Companies
Accelerated

14

Week Intensive
De-risking Program

4

Weeks of Curated
Customer & Investor
Roadshows

~50%

Raise within 6
Months

Vertical Focus



EdTech



UrbanTech



HealthTech

~3% acceptance rate

Healthcare Portfolio Standouts

With over 90 digital health and med device companies Dreamit has one of the largest and most innovative healthcare portfolios



Biomeme

Unlocking onsite real-time DNA detection



Integrated Biology Platform to Design, Build, Image and Analyze Living Things



TISSUE ANALYTICS

Revolutionizing wound care through machine vision and machine learning



MedAware

Eliminating prescription errors and saving lives in real time via big data.



admetsys
ADVANCED METABOLIC SYSTEMS
Artificial pancreas counterbalancing treatment of insulin and glucose

REDOX^

Helps health systems manage their connections to cloud-based applications and scaling



Personalized radiation oncology based on long-term outcomes



TowerView Health

Device that helps patients manage complex medication schedules with ease

CYLERA

Cybersecurity appliance for network-connected medical devices

Attracting Companies Globally

We understand the worldwide startup and innovation ecosystem



Dreamit receives applications from 40+ countries
Acceptance rate <3%

Program Pillars

The Premier Global Growth-Focused Health Tech Accelerator




Coaching

- Pressure test assumptions
- Ideation around solutions
- Hands-on mentoring





Customers

- Multi-city customer immersions
- Early pilot possibilities
- Commercial validation

Capital

- Investor office hours
- Curated investor introductions
- Bi-coastal investor roadshow




Community

- Access to more than 500 alumni
- Activations at national events
- Continued support after transition



Dreamit Corporate Partners

- Provide deep industry expertise and feedback to startups
- Gain exposure to new technologies and business models
- Want “DNA transfer” of startup thinking to help change their culture

Independence 



Penn Medicine



TEMPLE
HEALTH

St Luke's
UNIVERSITY HEALTH NETWORK

Geisinger
Health Plan



OPTUM®



Mount
Sinai

DigitasHealth
LifeBrands



MASSACHUSETTS

Johnson & Johnson



AstraZeneca



Montefiore
Inspired Medicine



PHILIPS

Intermountain®
Healthcare

accenture




A great idea?

Your Roadmap



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A man in a blue t-shirt and a woman in a red tank top are playing Whac-a-mole at a fair. The man is smiling and looking at the woman as she uses a mallet to hit a mole that has just popped out of a hole in the game board. The game board is yellow with several holes and moles. The background is a blurred fair with other games and decorations.

**Your journey
may look more
like a game of
Whac-a-mole**

2 - 3 Key Assumptions



Certainty

@drcemil

A person wearing a red helmet, a red and grey long-sleeved shirt, black pants, and a red backpack is rappelling down a dark, wet rock face. They are holding a blue rope with both hands. The person is looking towards the camera. To the left of the person, a waterfall is cascading down the rock. The scene is outdoors and appears to be a recreational activity.

“What’s the bet?”



Scientific Method



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Pressure Test Assumptions





Sliding Backwards






- Assumptions will be wrong
- You'll feel like you are sliding on a sheet of ice

Market Trends

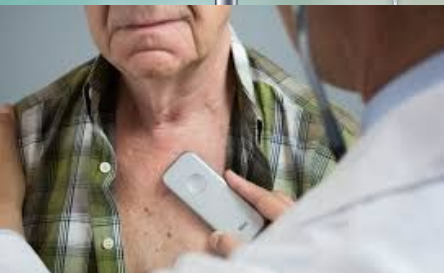
- ❑ **Top categories**
 - ❑ Digital health
 - ❑ Medical devices
- ❑ **Leveraging enablers**
 - ❑ Open source software and powerful tools enabling ability to rapidly prototype, experiment, and iterate at low cost
 - ❑ EHR integration
 - ❑ Big data
 - ❑ AI / machine learning
 - ❑ Low cost off-the-shelf microcomputing and sensor packages
 - ❑ New business models
- ❑ **Value-based care, bundled payments**



Dreamit Digital Health Co's

Company	Solution	Leverages
	Fully personalized radiation oncology based on long-term outcomes	Big data, EHR integration
	Stops prescription errors in hospitals	Big data, EHR integration
	NICU breast milk management	Rapid prototyping, smartphone as a platform, EHR integration
	EHR integration for the healthcare enterprise	EHR integration
	Prevent medical errors and increase billing via point-of-care guidance	Rapid prototyping, smartphone as a platform

Smart Medical Devices Connected + Integrated



Software and sensor combinations

- ❑ Deliver core clinical functionality
- ❑ Move data to / from the cloud / EHR or other systems
- ❑ Utilize AI / big data / machine learning
- ❑ Provide dashboarding & alerting
- ❑ Create opportunities to connect traditional medical devices
- ❑ Eliminate multiple displays and standalone units
- ❑ Better integrate and correlate data from multiple devices

Where Commonly Used



Multiple Care Settings

- Inpatient
 - OR / ER / ICU
 - Patient floor / room
- Outpatient
 - Clinician's office / exam room
 - Labs
 - Home / Rehab / Long Term Care

Multiple Care Delivery Modalities

- Clinician tools
- Wearables
- Implantables

What We Are Seeing

Sensing, more intelligence, reacting... smaller, faster, cheaper



Smart medical devices that

- ❑ **Capture data, react in real time**, and flow into larger systems
- ❑ Provide smart, connected **early warning**
- ❑ Allow for **automation of care** previously delivered manually
- ❑ Provide new modalities **making the invisible visible**
- ❑ Illuminate dark spots **between patient visits**
- ❑ Have **no / low upfront cost** + subscription

Why Now? External Forces

Providers

- ❑ Driving care to lower cost settings and closer to patient
- ❑ Focusing on better / faster patient outcomes
- ❑ Asking clinicians to do more with / for less
- ❑ Bearing more risk due to readmission warranties

Patients

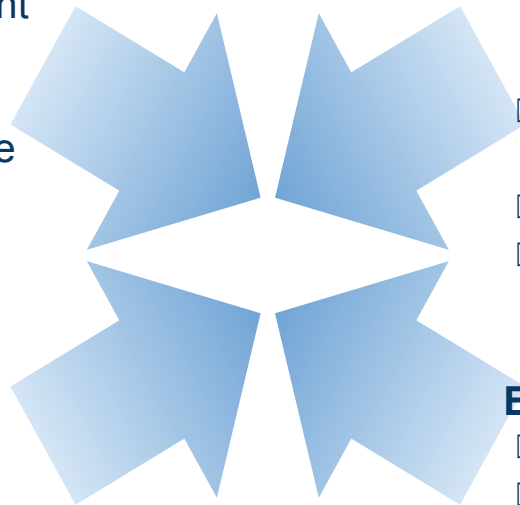
- ❑ Asked to take more responsibility
- ❑ Forced to accept higher deductible insurance plans (in US)

Payers

- ❑ Increasing fixed “value-based” payments and episode of care capitation
- ❑ Driving risk sharing of costs with providers
- ❑ Focusing on quality measures
- ❑ Asking for cost savings via better care versus more

Entrepreneurs

- ❑ Solving own problems
- ❑ Doing more with less
- ❑ Responding to pervasive entrepreneurial thinking, knowledge and assistance

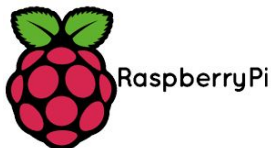


Why Now? Enabling Trends - 1

Ability to prototype, experiment, vet, and iterate quickly and at low cost

Hardware

- ❑ Low cost off-the-shelf microcomputing and sensor packages
- ❑ Leveragable existing platforms (e.g., smartphones)
- ❑ 3D printing / low cost prototyping
- ❑ Inexpensive on-demand cloud computing / storage



Software

- ❑ Open source software
- ❑ On-demand “functionality as a service” for AI / machine learning
- ❑ Robust APIs and integration points to ingest and send rich data
- ❑ Access to and ability to store massive data sets



Why Now? Enabling Trends - 2

Ability to de-risk, achieve major milestones, and exit on less capital

- ❑ **Stronger business models**
 - ❑ New revenue models
 - ❑ New go-to-market strategies
 - ❑ Leveraging devices across markets
- ❑ **Well understood regulatory approval path**
- ❑ **Venture capital willing to invest**

Example

Go To Market

<p>Hardware B to C</p> <p>Channels: Online marketing, device distributors, earned media, & paid influencers</p> <p>CAC: \$30-\$60</p> <p>LTV: \$290</p> <p>TAM: \$200M</p>	<p>Clinical Telemedicine Software B to B</p> <p>Channels: Activating hardware customers</p> <p>CAC: \$150-\$300</p> <p>LTV: \$3000</p> <p>TAM: \$800M</p>	<p>Remote CHF Monitoring Platform B to B</p> <p>Channels: Activating telemed and hardware customers</p> <p>LTV: \$300K - \$3M</p> <p>TAM: \$10B</p>
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Putting it Together & The Future

External Forces

- ❑ Payers, providers, patients, and entrepreneurs
- ❑ **Exerting more pressure to drive adoption of smart medical devices with compelling ROI**

Enabling Trends

- ❑ Hardware, software, business models, regulatory path, and venture capital
- ❑ **Making things better, faster, cheaper, and easier**

The Future? Accelerating non linear growth in smarter medical devices coming to market

What you should be doing about it

- ❑ Define and challenge why, success & KPI's
- ❑ Ask critical questions around key assumptions
- ❑ Work with high quality startups
- ❑ Run trials and pilots
- ❑ Look for easy and clever ways to get started and prove value ASAP
- ❑ Spin up / out ideas - de-risking approach

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