



The Diversified Services Group, Inc.
A Financial Services Consultancy



HealthCareFundingRoadmap

A short, defined process to put you on the road to developing a significant, sustainable revenue stream

Bob Grieb,
Principal, DSG
610-989-1710, x3
rfgrieb@dsg-network.com

Heywood Sloane
Principal, DSG
610-457-2906 (M)
Heywoods@dsg-network.com

Overview

Healthcare funding is a critical issue for everyone. It is the greatest “known unknown” in virtually everyone’s financial plan & legacy. If you don’t help your clients address it, someone else will – and will take your clients!

If done well, a healthcare funding profit center will have a very positive impact on your:

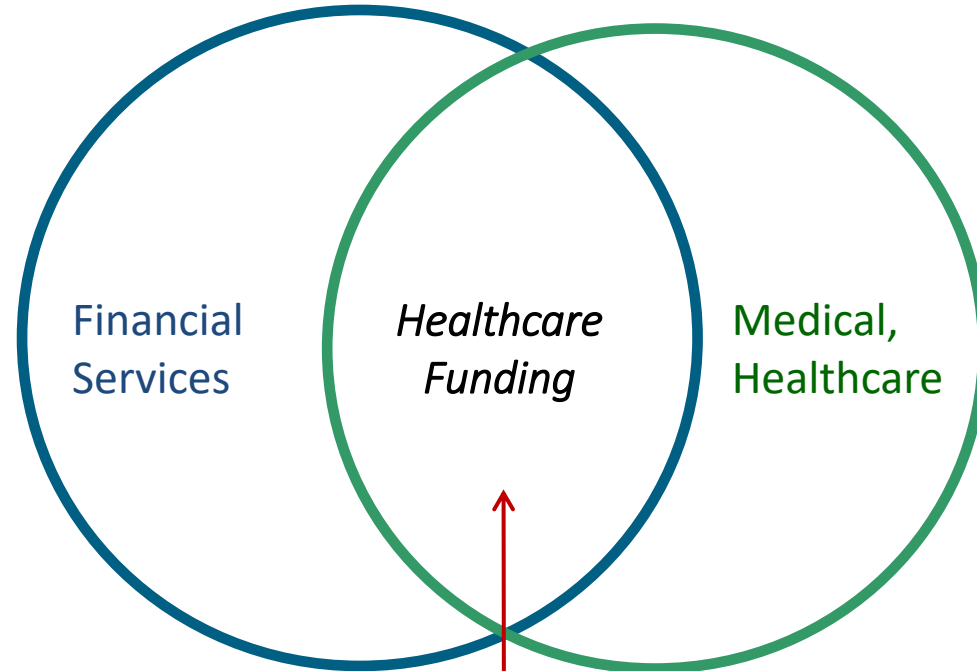
- Client acquisition, retention and loyalty
- Share of wallet and
- Revenue growth and bottom line.

In a 3 - 5 week focused project, we will define your roadmap to make addressing healthcare funding a true profit center for your firm.

We accomplish this by leveraging our unique experiences working at the intersections of healthcare and financial services, marketing and technology, and consumer and institutional risk management.

Industry Landscape

- Commoditization of core services
- Need to differentiate value
- Changing consumer experiences and expectations
- Margin compression
- Revenue volatility
- Demographics and public policy driving increased health & care funding concerns

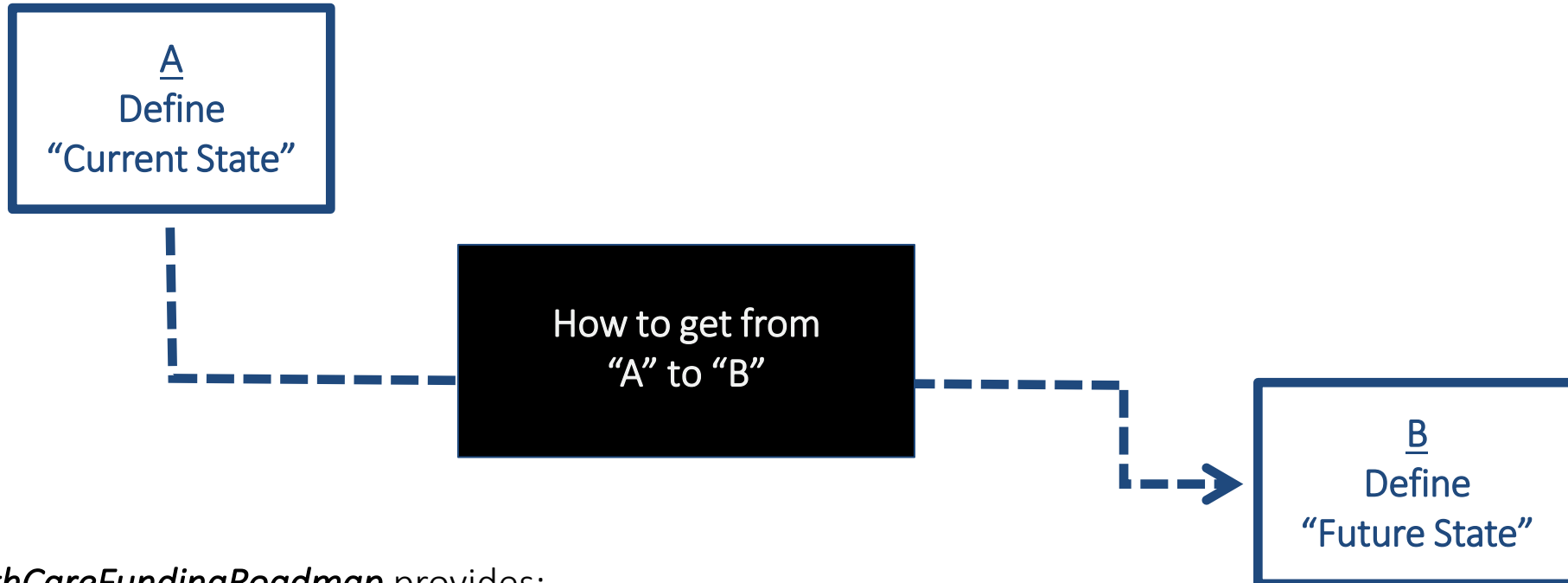


- Hyper-specialization and rapid advances drive expense
- Increased need for consumer to control
- Increased need for consumers to fund
- Fee for 'Results' replacing fee for 'Service'
- Demographic driven needs growth outpacing resources

Opportunity or Threat???

You Decide...

A *HealthCareFundingRoadmap*



A *HealthCareFundingRoadmap* provides;

- An objective evaluation of your “Current State”
- The requirements for a realistic “Future State” – based on your strengths, capabilities and markets
- A practical series of steps to achieve your “Future State” including real client engagement, enhanced distribution, meaningful analytics and significant revenue growth

A HealthCareFundingRoadmap

Approach and Resourcing

- Our goal is minimal disruption of your executives and staff. We conduct a clearly defined set of interviews with key personnel to document the current situation, capabilities and understand your issues and strategies.
- Interviews include the key people on your team. Typically from:
 - Marketing, sales, and client experience.
 - Product management, development and competitive intelligence
 - Operations, data processing, and human resources.
 - If needed, limited input from selected customers.
- We define information for the analysis based on your data capabilities and constraints.
- We analyze to minimize time spent by your people.

A *HealthCareFundingRoadmap*

Key Questions

- Are your client's getting the personal experiences and outcomes they want?
- Are you your products and services positioned to assure that in the future?
- Are your distribution teams and channels ready and able to tap your key markets with agility and confidence?
- How can you leverage existing capabilities to generate additional revenue effectively?
- Do you have the tools you need to maintain the quality and stability of your revenue base?

A *HealthCareFundingRoadmap*

Analysis

- Focus on your markets, current capabilities and results
- Analyze them in the context of our knowledge of trends and best practices across both industries.
- Through “holistic lenses”
 - Client and Family
 - Financial, Medical, and Care risks and requirements
 - Lifecycles
- Uncover a best path to a ‘Health Care Funding’ profit center

A HealthCareFundingRoadmap

Key Attributes for a Successful Strategy

- Implementable
- Achievable based on your situation
- Clear direction
- Appropriate steps and checkpoints to navigate and stay on the “best” path

A path to a new revenue stream

A HealthCareFundingRoadmap

Benefits

- **Enhanced Client Engagement**
 - Expanded & holistic
 - Differentiated
 - Personalized & client accessible
- **Expanded Distribution and Capability**
 - New channel – immediate implementation
 - Low cost alternatives
 - Scalable outsourced solutions
- **Effective Analytics**
 - Identify behaviors to “meet client where they are”
 - Improve service and distribution support
 - Refine product sets
- **Significant Revenue Growth**
 - Predictable and sustainable streams
 - High quality and durable relationships

A *HealthCareFundingRoadmap*

We do it the “Right Way”

To create your *HealthCareFundingRoadmap*, we will:

- Bring the right team
- Work with your team the right way
- Ask the right questions
- Do the right analysis
- Recommend direction and steps that are right for you

We do it efficiently and limit demands on your resources.

For more information,
please contact us:

Bob Grieb,
Principal, DSG
610-989-1710, x3
rfgrieb@dsg-network.com

Heywood Sloane
Principal, DSG
610-457-2906 (M)
Heywoods@dsg-network.com