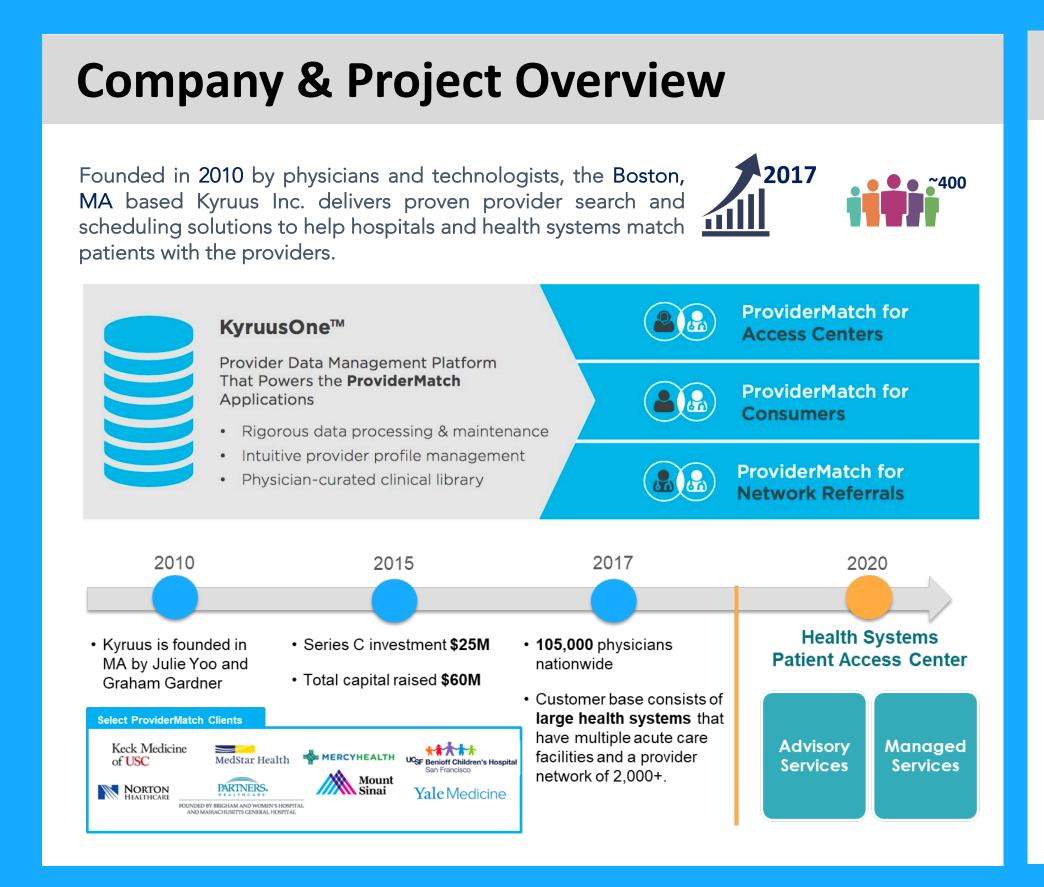
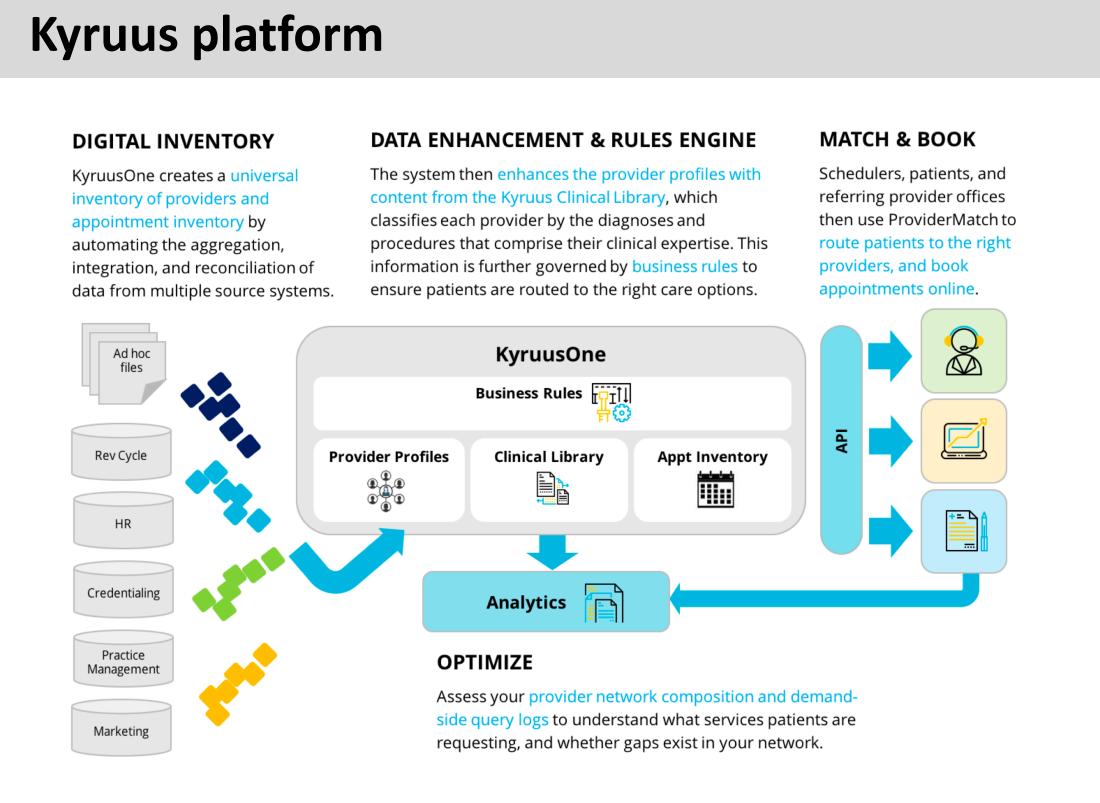


Opportunity Analysis Patient Access Center Offerings and Market

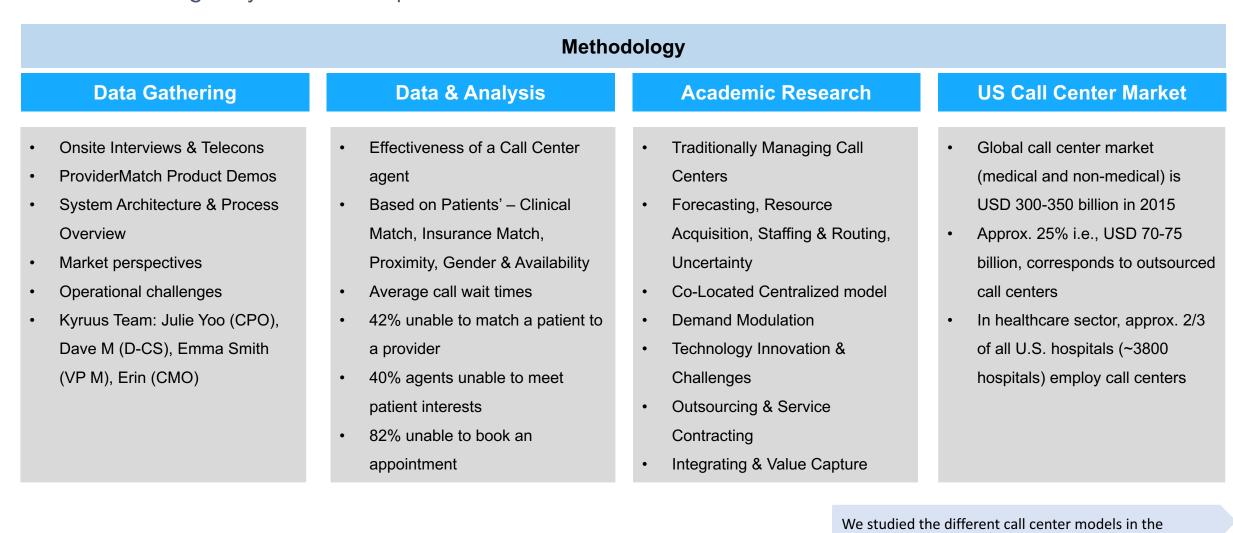






Market Research and Methodology

Our research focused on identifying on (a) performing a market landscape analysis and (b) assessing the demand for outsourced call centers, together with demand drivers and barriers to adoption, to inform Kyruus strategy and recommend the service offerings they should develop.



:•: Distributed Centralized - Co-located Centralized - Integrated Optimized network Health Better patient routing Investment in a separate space (dependent upon setup) utilization System Cross-trained agents & flexible Standardization & efficiency is not required Support for specialties with improves call complex requirements Fewer directories to maintain Improved patient demand conversion Provider Direct communication with Enhanced focus on in-office More effective patientschedulers patient care with fewer provider matching Sense of control over practice Ability to tap into broader distractions for practice staff operations patient demand Personal relationships Simplified access experience Shorter time to appointment Patient developed with schedulers with single phone number Consistent access experience Preference of dealing directly Decreased likelihood of call Assistance identifying with the practice rather than abandonment appropriate providers an access center Fewer call transfers & higher call resolution Health Lack of visibility into full Lack of visibility into full Significant change provider network provider network management required System Uneven demand distribution Some change management Strain on access center 品 across network required agents without appropriate Limited ability to measure Scheduler productivity is not infrastructure and technology performance across system maximized Risk of patient calls going unanswered Uneven demand distribution Provider Perceived loss of control as Perceived loss of control as schedulers move to central results in underutilization or schedulers move to central overbooking access center access center Difficulty navigating the Some variability in patient Potential access issues if Patient health system to find right provider data is outdated experience Need to navigate phone tree provider incomplete, or inaccurate Long wait times for appointments Large variability in patient experience across specialties

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Patient Access Center – Existing Competition



Signius Communications

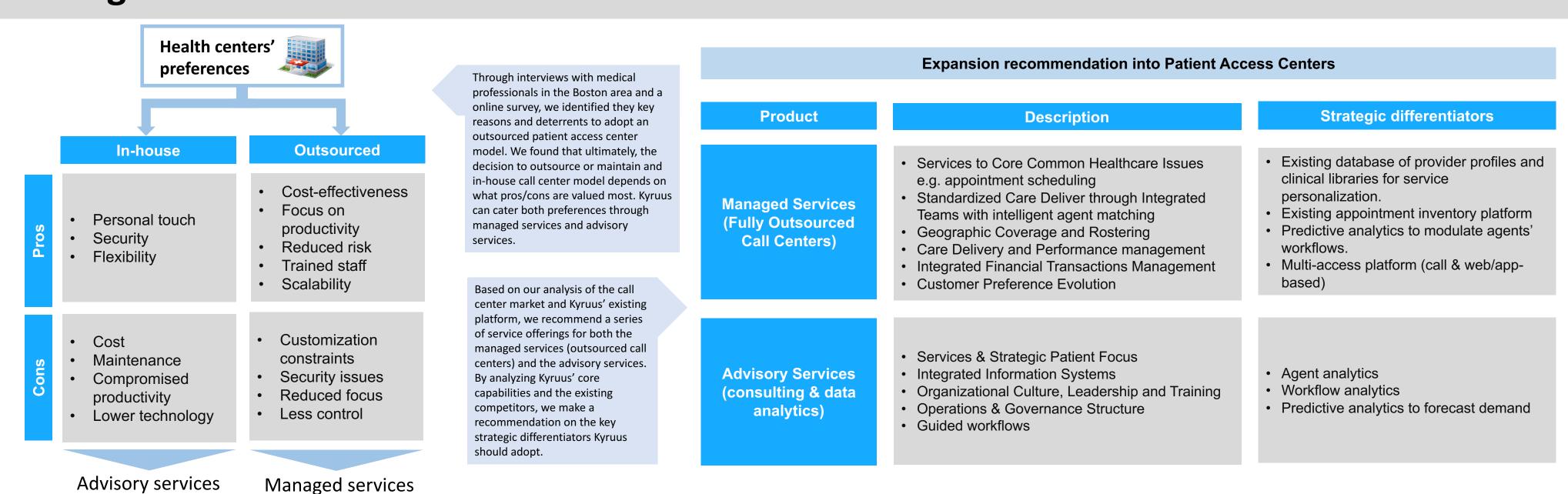
We identified key competitors of Kyruus in the outsourced call center market. Based on their analysis, we recommend the following strategic differentiators.

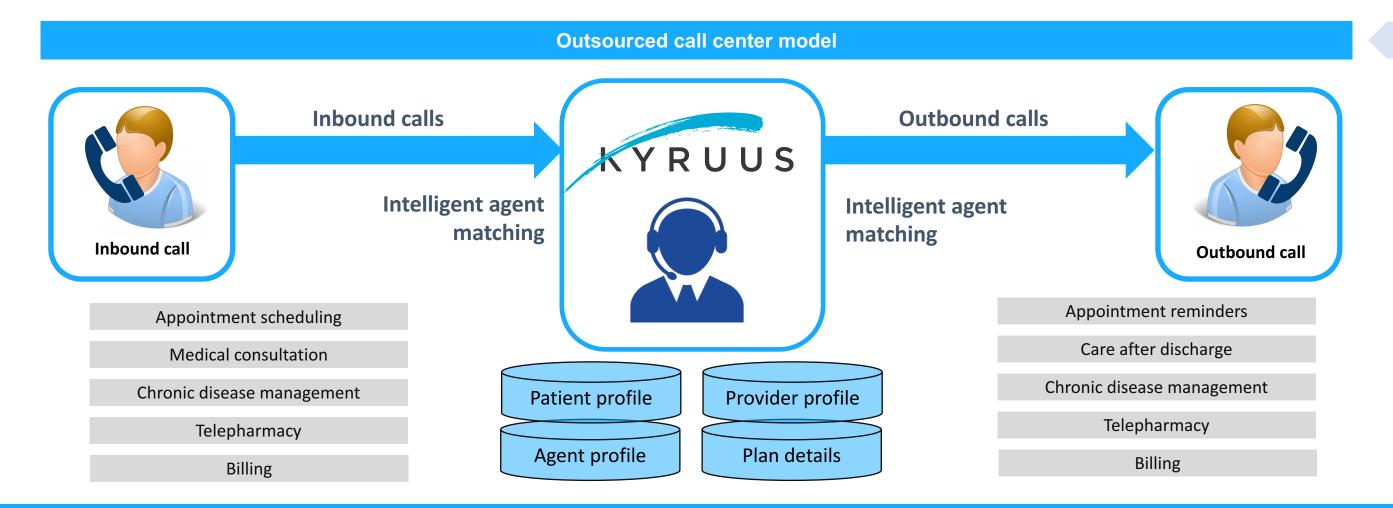
hospital industry and identified the key drivers for

demand and barriers to adoption for outsourcing.

		Outsourcing
Drivers of demand		Barriers to adoption
Address peak volume outflow Reduce staffing issues Specialized industry knowledge	 Cost reduction potential Better cost management Big data analytics and multiple engagement platforms 	 Lack of customization in service Lack of control Security and privacy issues

Strategic Differentiators & Recommendations





We recommend an outsourced call center model that leverages Kyruus' existing big data capabilities to adequately perform agent matching and modulate demand flows, while providing different services beyond appointment scheduling.

