

Create Value

Customer Decision Making

Capture Value

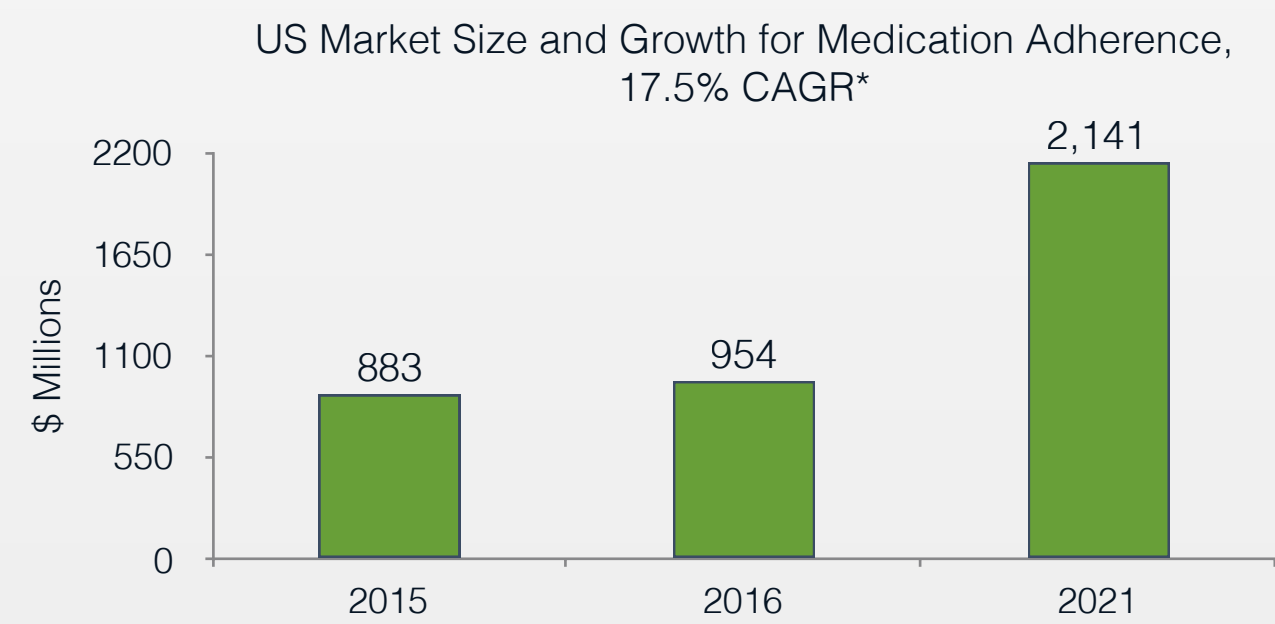
Strategic Resources

Deliver Value

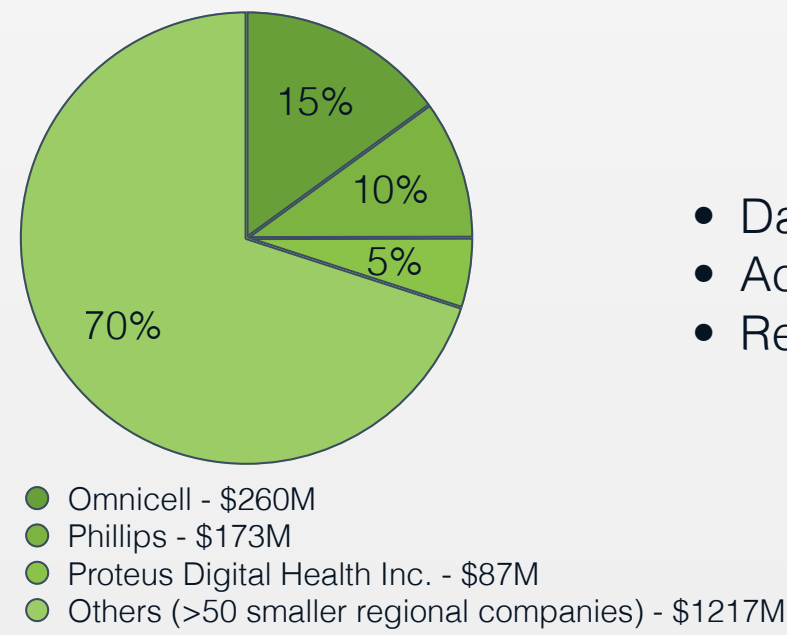
Vertical Competition



Medication Adherence - \$2.1B by 2021



Competitive Landscape

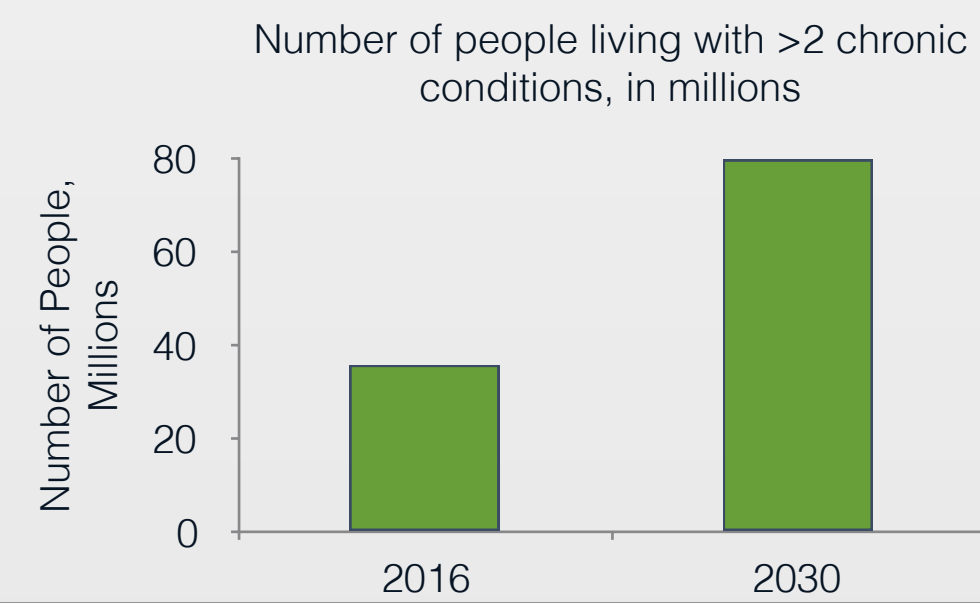


Barrier to Entry for new entrants

- Data privacy and security
- Accuracy and consistency of data
- Regulatory issues



Chronic Care Management - \$5B by 2030



Competitive Landscape

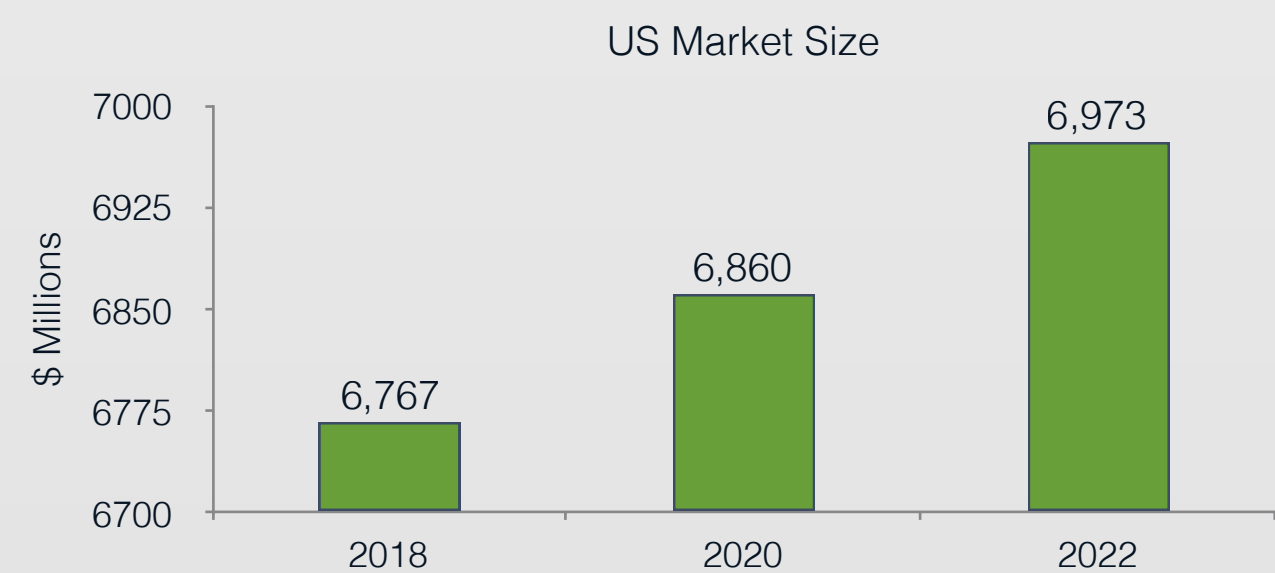
Few small local players but no major competitors.

Barrier to Entry for new entrants

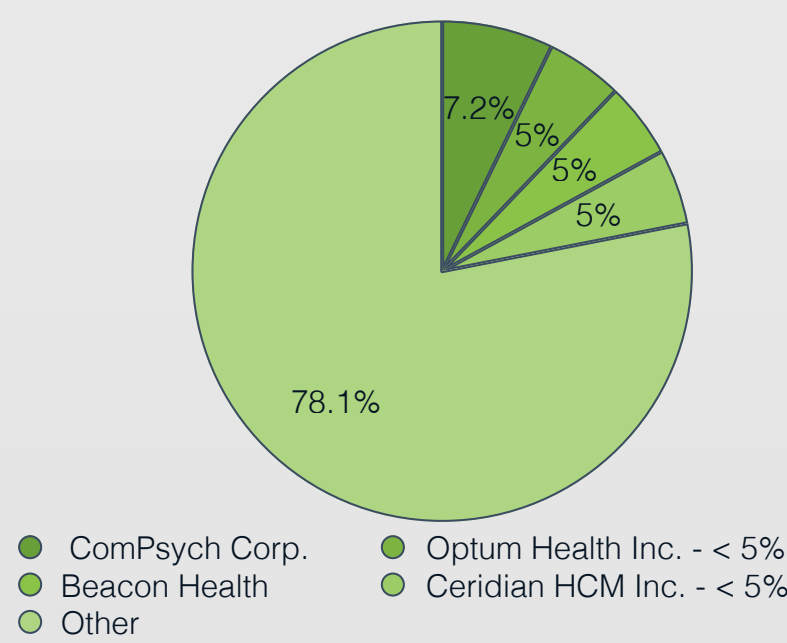
- Quest's CCM services like nurse care coordinators and comprehensive reports of patient's care
- Walmart's grocery section to adhere to diet
- MyQuest mobile app
- Cardio IQ program



Corporate Wellness - ~\$7B by 2022



Competitive Landscape

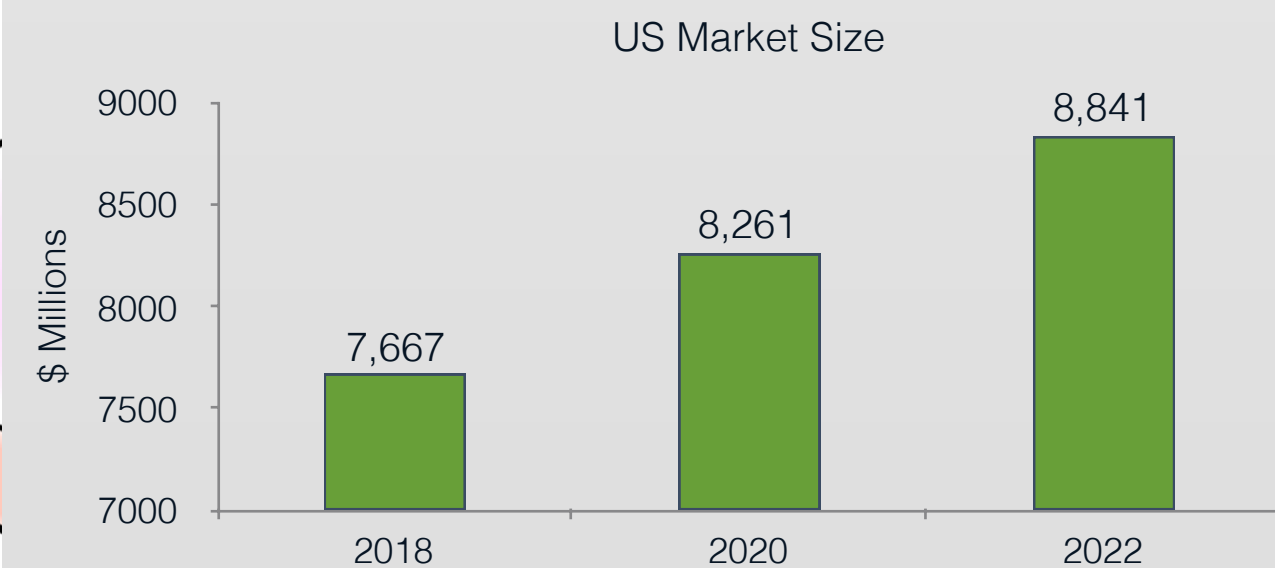


Barrier to Entry for new entrants

- Hiring and retaining the workforce needed. E.g, nutritionists and physical therapists
- Acquiring technology needed to collect and analyze data
- Ability to demonstrate return on investment



Sleep Management - \$8.5B by 2022



Competitive Landscape

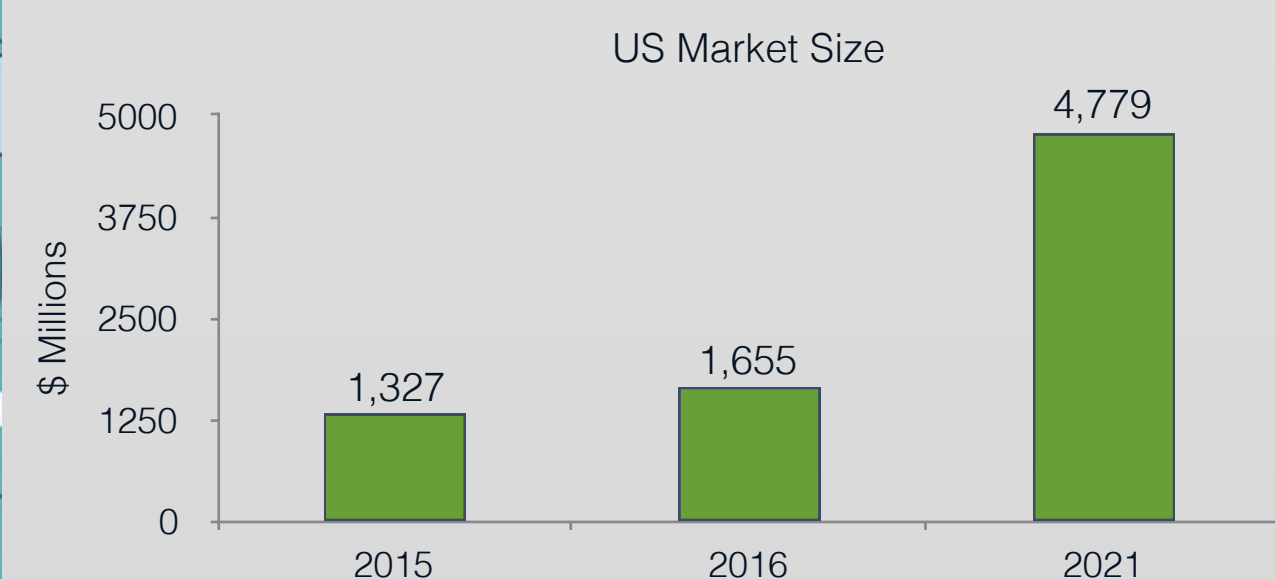
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Barrier to Entry for new entrants

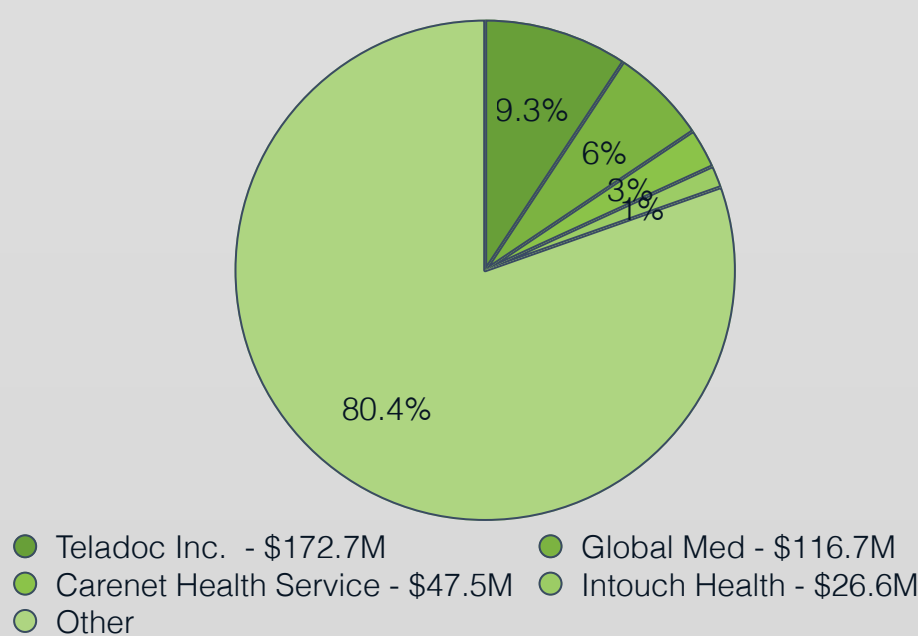
- Recruiting highly skilled workforce
- Understanding legislation surrounding healthcare coverage
- Solid understanding of health insurance policies
- Procurement of specialist equipment



Telehealth - \$4.8B by 2021



Competitive Landscape



Barrier to Entry for new entrants

- Quest's CCM services like nurse care coordinators and comprehensive reports of patient's care
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