

The Diabetes Solution Landscape

Guidance for Employers in a Fragmented Ecosystem






The diabetes solution landscape

At EHIR, we often look to our existing partners for the latest evidence on what is happening in the market. Over the last year, we have identified an emerging trend—employers are increasingly partnering with more than one diabetes solution. As an example, EHIR Member Dean Foods partners with three different solutions (see table below), each targeting a different aspect of the diabetes patient journey—prevention, management, and reversal.

According to Mike Adams, Head of Benefits at Dean foods, “Today, no one vendor serves the full spectrum of diabetes needs. Perhaps that will change, but for now, diabetes is a big enough problem to merit smart investment in a comprehensive, multi-vendor solution set.”

The EHIR team set out to investigate this trend further, and put together our findings in this research report, including experiences from a large benefits provider that has seen very positive results.

Diabetes is clearly an enormous problem, contributing to 1 in 7 healthcare dollars, which is why it’s worth considering why some leading employers are investing in multiple solutions.

	Diabetes Prevention	Diabetes Management	Diabetes Reversal
Description	Lifestyle intervention focused on weight loss and exercise, for patients living with prediabetes.	Remote monitoring and lifestyle coaching for patients living with type 2 diabetes.	Medical-nutrition therapy and continuous virtual physician care for patients living with type 2 diabetes.
Goal	Prevent worsening of condition and progression to type 2 diabetes.	Achieve and sustain better control of blood sugar and reduce adverse events.	Return blood sugar to non-diabetic levels and safely eliminate diabetes medications.
Category-defining Vendor*			

* Today, all three vendors have begun to expand into multiple categories of the continuum

Employers are tackling diabetes with multiple vendors

Until recently, most employers had focused on working with a single vendor for tackling conditions like diabetes. The benefits of partnering with just one vendor are obvious, namely, simplification of administrative overhead such as contracting, communication, data sharing, and reporting.

However, given the divergent categories listed above, as well as the massive costs driven by diabetes and its comorbidities, many employers are seeing significant advantages from working with multiple vendors. Some of these advantages include:

- **More Choice:** Give employees the opportunity to choose the solution that is right for them.
- **Higher Engagement:** Get higher participation overall compared to a single vendor approach due to increased variety in messaging.
- **Complete Offering:** Take advantage of complementary capabilities to craft a more complete offering to address the various needs of the full population.
- **Outcomes Comparisons:** Compare which program is most effective within its respective target patient population.
- **Accountability:** Use different vendors to keep one another accountable.

Who are the market leaders in the type 2 diabetes space?

Omada Health is a digital care provider that delivers dynamic, personalized programs for individuals at all stages of the diabetes spectrum, from a prevention program for those with prediabetes, to a comprehensive self-management program for those dealing with type 1 or type 2 diabetes. Omada for Prevention is the nation's largest provider of the Diabetes Prevention Program with full recognition from the Centers for Disease Control and Prevention.

Enrolled participants are paired with a professional health coach with relevant credentialing. Participants are also placed into groups of similar individuals, with whom they progress through the programs' curricula and on whom they rely for support and accountability. Finally, participants are sent relevant hardware to monitor their progress throughout the program—prevention participants receive a wireless scale which records weight loss.

EHIR Member



15

Peer reviewed articles
& claims analyses

41M

Meals tracked via
the Omada app

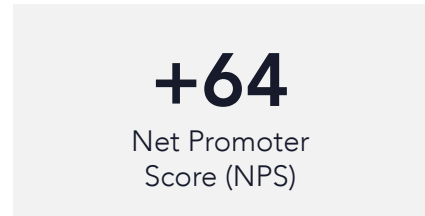
4–5%

Bodyweight reduction
after one year

In 2014, **Livongo** introduced an approach to using digital and live coaching to make a meaningful difference in diabetes—a notoriously difficult condition to manage. Since then, the company has built on its learnings to offer integrated programs for managing diabetes, pre-diabetes, hypertension, weight management, and behavioral health. This whole-person approach to behavior change delivers clinical, financial, and satisfaction results across the board.

More than simply a digital app, Livongo programs include the company’s own FDA-approved connected devices—such as blood glucose monitors—that collect Members’ biometric data and inform appropriate feedback. This full-spectrum approach supports the ongoing maintenance of chronic conditions, as well as acute care scenarios. For example, through the company’s diabetes response service, expert health coaches proactively reach out to Members within minutes of them registering a higher or lower than normal blood glucose measure—responding when time is of the essence to get people back on track with their health.

EHIR Members

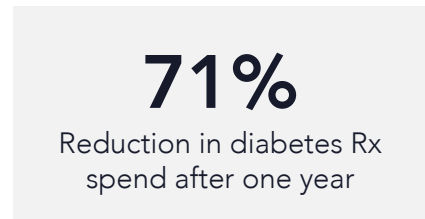


Disclaimer: Data in gray boxes have been provided by vendors, not validated by EHIR.

Virta Health offers the first clinically-proven medical treatment to reverse type 2 diabetes without the need for drugs or surgery. Unlike diabetes management solutions—which work to stabilize high blood sugar through costly prescription drugs—Virta’s diabetes reversal treatment returns blood sugar to subdiabetic levels (hemoglobin A1c below 6.5), while safely eliminating all diabetes-specific medications.

Virta reverses diabetes through a highly individualized medical-nutritional therapy, delivered virtually by a tech-enabled, physician-led medical group. Patients are coached to adopt a low carbohydrate nutrition plan, which has been listed as a first-line therapy for type 2 diabetes by the American Diabetes Association in their 2019 & 2020 Standards of Care. As patients make nutritional changes, their blood sugar drops quickly, which requires rapid adjustments to their medications. Virta employs board-certified physicians, who typically are able to cut insulin dosage by 50% in the first week, and eliminate most diabetes drugs completely by 10 weeks.

EHIR Members



Treatment Modalities (✓ = capability present)

	Omada	Livongo	Virta Health
Health coaching	✓	✓	✓
App-based coaching	✓	✓	✓
Remote monitoring of biomarkers	✓	✓	✓
Connected glucose devices	✓	✓	
Physician-led medication adjustments			✓
Medical nutritional therapy			✓

Case study: Concordia Plans



Concordia Plans is non-profit benefits provider that offers medical, disability, retirement, and savings plans to members of The Lutheran Church-Missouri Synod.

By the numbers

40,000

Concordia Plans members

6,000

affiliated organizations

\$230M

in annual medical claims spending

2,180

members living with type 2 diabetes

Concordia Plans utilizes **Livongo**, **Virta**, and **Omada**.

Launch Dates

Omada

January 2018

Livongo

October 2018

Virta

January 2019

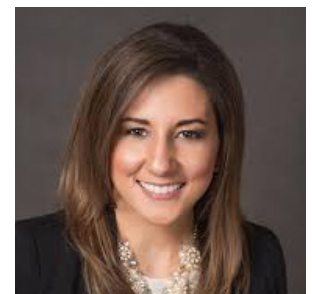
The following is an interview EHIR conducted with **Sara Correnti**, Manager, Health and Welfare Member Wellness Products at Concordia Plans:

Why did Concordia Plans implement all three of the above solutions?

Our mission is to serve ministries. Our wellness motto—"Be Well, Serve Well"—drives us further in taking care of our church workers so they can continue to serve in their roles, all while being good stewards of our financial resources.

When we started looking at where our population's risks lied, diabetes stood out. Our population has a high prevalence of diabetes—above national benchmarks—as well as claims cost. So after research and vetting, we implemented Omada in 2018, and then added Livongo, and then Virta. We also offer Naturally Slim.

The thought behind bringing in multiple options for diabetes care lies in the fact that we honor that each of our members is at a different level of readiness to change, and a different point in their health status and health motivation. We want them to have the opportunity to find what they need when they need it. Our wellness ecosystem is designed to be like a highway with several different "onramps" or access points to wellness, allowing our members to jump in when and where they're ready.



Sara Correnti, MS, RD, LD
Manager, Health and Member Wellness Products, Concordia Plans

Why go so deep on diabetes?

It goes back to addressing the highest risk in our population. But we also looked at it from the member's side. We take care of employees so they can stay in the workforce, so they can continue serving in all of their roles in life, not just their profession. The sooner the intervention, and the sooner we control blood sugar levels, the lower they are at risk of being pulled out of their roles for costly condition management like wound care or even dialysis. It all just snowballs.

I would encourage benefits leaders to consider not just the financial ROI, but also the clinical ROI, the cultural ROI; it's not always just about the financial bottom line. Ask yourself "How is their health better in the long-run because of this program? How are your offerings impacting your population's experience with their employer?" Of course we think about the money but we are also cognizant of what these are doing for our members' lives. We want to ensure we are showing them we care for them as much as they care for those that they serve.

Were you worried at all about overlapping capabilities of the different vendors?

From our side, when an existing vendor partner launches a new solution, we still treat it like they are a brand new offering. We try not to lump the brand relationships with all their offerings. You can be really good at a lot of things, or you can be great at a couple things. We continue to keep a pulse on all these vendors and assess what they excel at, combined with what our members are needing.

How were solutions communicated to members?

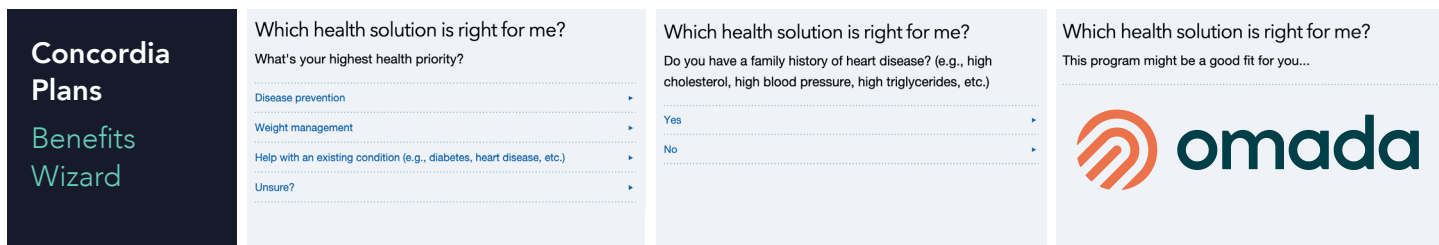
Launch communication was easier because of our phased implementation, so we could focus on one at a time. Now that everything is implemented, what we're tasked with is promoting this robust ecosystem, along with all the other offerings we have. We have to compete with a lot of messaging, and make sure we're not overwhelming our members. It's a delicate thing to balance. It takes a lot of strategic planning.

For example, recently we looked at our member risk alongside the offerings we have in place, and then determined a hierarchy of marketing priority across our whole health and wellness ecosystem. This determined which message would get priority should messaging ever come to compete. Thankfully, our strategic planning is playing out nicely that we haven't had to choose one over another yet. But, I think it's good practice to have a plan in place when trying to offer a variety of programs at once, especially if they seemingly compete with one another like our diabetes programs may seem to from our members' seat.

How were members guided to the right solutions?

Concordia provided two methods to guide members to the right solution. One was a traditional online benefits portal, that provided detailed descriptions of each of the diabetes benefit options. The second was a “benefits wizard”, that asked members a series of questions to steer them in the right direction.

This wizard is a very comprehensive flow of questions & decision tree that’s buttoned up very nicely to guide you to the program that is the best fit. From there, they are directed to the landing page.



What are some key outcomes you think are noteworthy from each vendor?

Omada

We had a lot of people enroll, which was surprising since it is a program you need to qualify for. We had over 13k pounds of weight lost, and people are still maintaining their weight loss. We’ve been really pleased with those outcomes. We just want to make sure the behavior change is sustainable, which so far seems to be true.



Livongo

The program pulls real time feedback for people with diabetes to help them manage their blood sugar better. Livongo gives them little bite sized pieces to digest. It can be a good program for people who are novices at living with diabetes. The biggest impact we’ve seen is that for members with a high A1c we’ve seen a fairly significant decrease within their first few months of being in the program.



Virta

We have had phenomenal results with them. None of us were ready for the eagerness of employees to share their stories. They’re telling everybody. There’s such genuine appreciation for the program, amazement and gratitude. Not just the results but how quickly they’re getting them. And we are seeing real savings within just a year. That’s amazing. It’s rare to find something where you can see such savings in a short amount of time.



Concordia's enrollment results

	Omada	Livongo	Virta
Enrollments to date	1,971	319	249
Enrollments (2019)	227	73	175
Launch date	January 2018	October 2018	January 2019



Concordia Seminary, St. Louis
Clayton, Mo.

Outcomes at Concordia Plans

Omada

7,466 lbs

lost across all participants

29%

of members achieved >5% weight loss

"I have tried to lose weight before. I would do great, but I would lose too fast, get too hungry, and then put the weight back on. I put myself into little cycles of ups and downs, and then give up. I am delighted to say I am losing slowly and steadily."

Omada Patient, Concordia Member

Livongo

Segmented eHbA1c ● <7 ● 7-8 ● 8-9 ● 9-10 ● ≥10 ● N/A

Segment	self-reported A1c at registration	3M	6M	9M
≥10	11.2	7.2	7.0	7.0
9-10	9.2	7.2	7.2	7.2
8-9	8.2	8.0	8.0	8.5
7-8	7.2	7.0	7.0	7.0
<7	6.2	6.5	6.5	6.5

Those with A1c > 10 experienced a 4.2 point reduction on average.

"The messages on the meter, the ability to input more information about a particular reading, and the alarms have all provided me with more control and consistency in treatment of my diabetes."

Livongo Patient,
Concordia Member

Virta Health

A1c: Population Distribution

	<6.5	6.5-7.4	7.5-8.4	≥8.5
Baseline A1c	20%	36%	22%	22%
Current A1c	71%	15%	10%	4%

More than 71% of patients now have A1c below the diabetes threshold, while eliminating diabetes drugs.

"I lived with type 2 diabetes for 15 years before I found Virta through my employer. After just two and a half months on Virta, I was able to stop taking all three of my diabetes medications. I am so energized by the thought I can now live without my medications, which I previously thought was impossible. Virta has changed my life."

Bonnie Parker,
Concordia Member and Virta Patient

Conclusion

Type 2 diabetes is one of the most expensive, prolific, yet treatable chronic diseases that impacts your company. A large and growing percentage of your medical plan enrollees either currently or will one day suffer from diabetes—impacting your medical costs, and the quality of life of the employees that keep your company running. You owe it to your shareholders, managers, and employees to design and deliver programs that will make an impact. And as you just read—treating type 2 diabetes effectively means attacking it from multiple angles: prevention, management and reversal.

Key take-aways

Diabetes is a complex disease that needs to be addressed in multiple ways; for the best chance at success, don't limit yourself to solving only part of the problem.

Partnering with multiple vendors is an effective way to improve the health of your population across the continuum of care.



EHIR would like to thank Livongo, Virta, and Omada for the generous support in funding this research report. EHIR is an independent-third party designed to expedite the adoption of innovation by working with the world's leading employers and emerging benefits solutions. For further guidance on the digital health solution landscape, EHIR offers a full suite of advisory services to help employers find solutions that are best for their company. For more information, visit the EHIR website: ehir.com or email ehir@ehir.com.