



Wolters Kluwer Health



Investor Seminar
28 October 2013



Wolters Kluwer

When you have to be right

Forward-looking statements

This presentation contains forward-looking statements. These statements may be identified by words such as "expect", "should", "could", "shall", and similar expressions. Wolters Kluwer cautions that such forward-looking statements are qualified by certain risks and uncertainties, that could cause actual results and events to differ materially from what is contemplated by the forward-looking statements. Factors which could cause actual results to differ from these forward-looking statements may include, without limitation, general economic conditions, conditions in the markets in which Wolters Kluwer is engaged, behavior of customers, suppliers and competitors, technological developments, the implementation and execution of new ICT systems or outsourcing, legal, tax, and regulatory rules affecting Wolters Kluwer's businesses, as well as risks related to mergers, acquisitions and divestments. In addition, financial risks, such as currency movements, interest rate fluctuations, liquidity and credit risks could influence future results. The foregoing list of factors should not be construed as exhaustive. Wolters Kluwer disclaims any intention or obligation to publicly update or revise any forward-looking statements, whether as a result of new information, future events or otherwise.

This presentation includes revenue and ordinary EBITA figures. For a reconciliation between ordinary EBITA and IFRS operating profit please refer to our annual report available on our website. Until 2010, Health division revenues and ordinary EBITA included the results of certain Pharma assets which were reported as discontinued operations starting in 2011. Revenues and ordinary EBITA for 2012 have been restated for IAS 19 revised and IFRS 11.

Today's speakers



Nancy McKinstry
Wolters Kluwer

Bob Becker
Wolters Kluwer Health



Susan Driscoll
Professional & Education

Cathy Wolfe
Medical Research



Arvind Subramanian
Clinical Solutions

Denise Basow
UpToDate

Sean Benson
Innovation



Agenda



Nancy McKinstry
CEO Wolters Kluwer



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

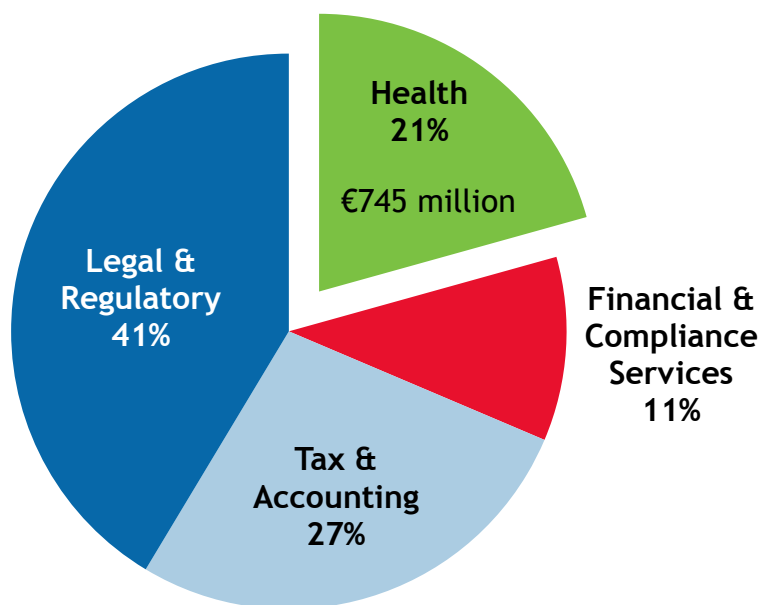
Clinical Solutions Demo

Q&A

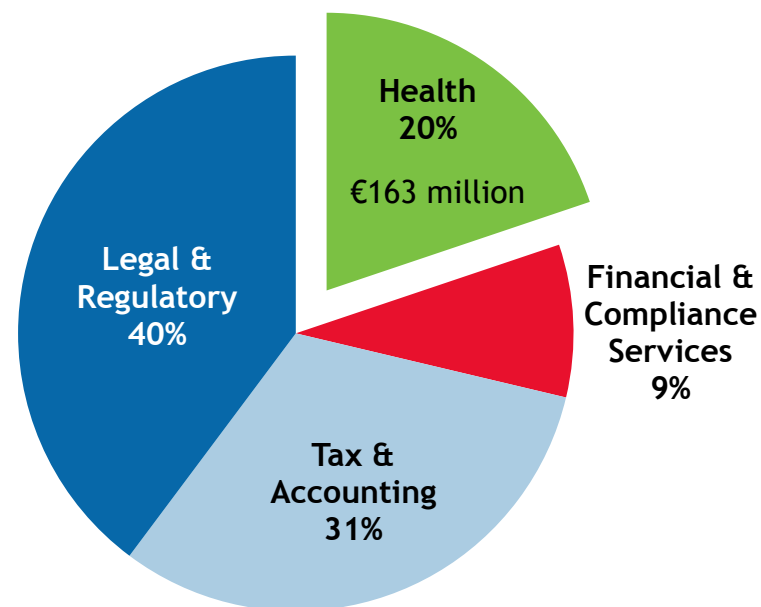
Wolters Kluwer Health in context

Approximately one fifth of group revenues and ordinary EBITA

Wolters Kluwer FY2012
Revenues €3,597 million



Wolters Kluwer FY2012
Ordinary EBITA €774 million



Note: FY2012 restated for IAS19 R and IFRS 11. Ordinary EBITA split excludes corporate costs of € 48 million

Wolters Kluwer strategy

Our strategy aims to accelerate profitable growth

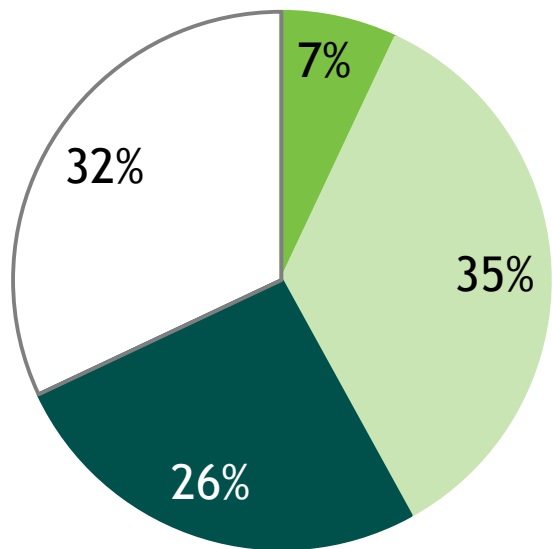


- Focus the majority of our investments on high-growth segments where we have achieved market leadership
- Invest in products and services to deliver the tailored solutions and insights our professional customers need to make critical decisions and increase their productivity
- Find more ways to drive efficiencies in areas such as sourcing, technology, real estate, organizational processes, and distribution channels

Transformation of Health

Clinical Solutions will soon be largest component

Wolters Kluwer Health 2006
Revenues € 823 million



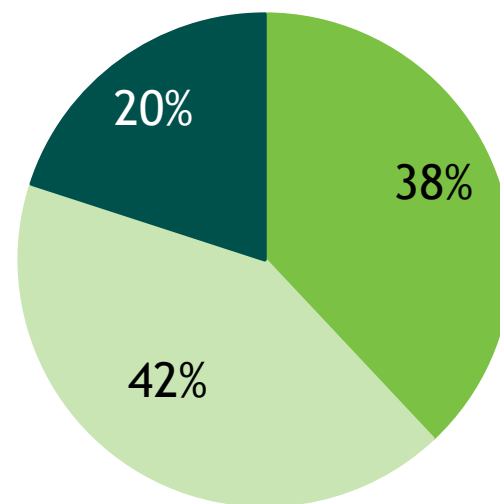
■ Clinical Solutions

■ Medical Research

■ Professional & Education

□ Pharma

Wolters Kluwer Health 2012
Revenues € 745 million



Ordinary EBITA € 120 million
Margin 14.5%

Ordinary EBITA € 163 million
Margin 21.9%

Agenda



Bob Becker
President & CEO
Health Division



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

Our mission

Focused on clinicians from learning to practice to improve access, quality and cost of healthcare

Professional & Education



Learning

- 20% of Health revenue
- Improve learning and build competency in education and practice

Medical Research



Research

- 42% of Health revenue
- Provide high quality, relevant medical content and precision search

Clinical Solutions



Care

- 38% of Health revenue
- Increase quality and outcomes for practicing medical professionals

Physicians | Nurses | Pharmacists | Allied health

Leading brands

Our brands are highly recognized in their target markets

Professional & Education



Learning

Lippincott Williams & Wilkins

Medical Research



Research

Ovid

Clinical Solutions



Care

UpToDate
Medi-Span
ProVation Medical

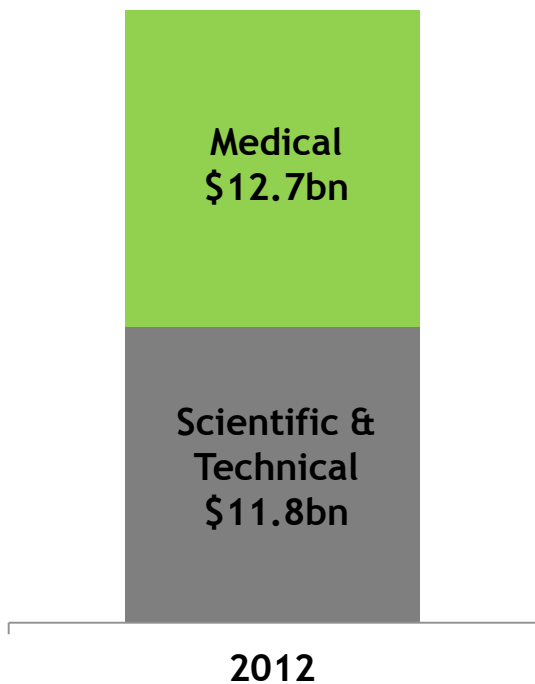


Wolters Kluwer

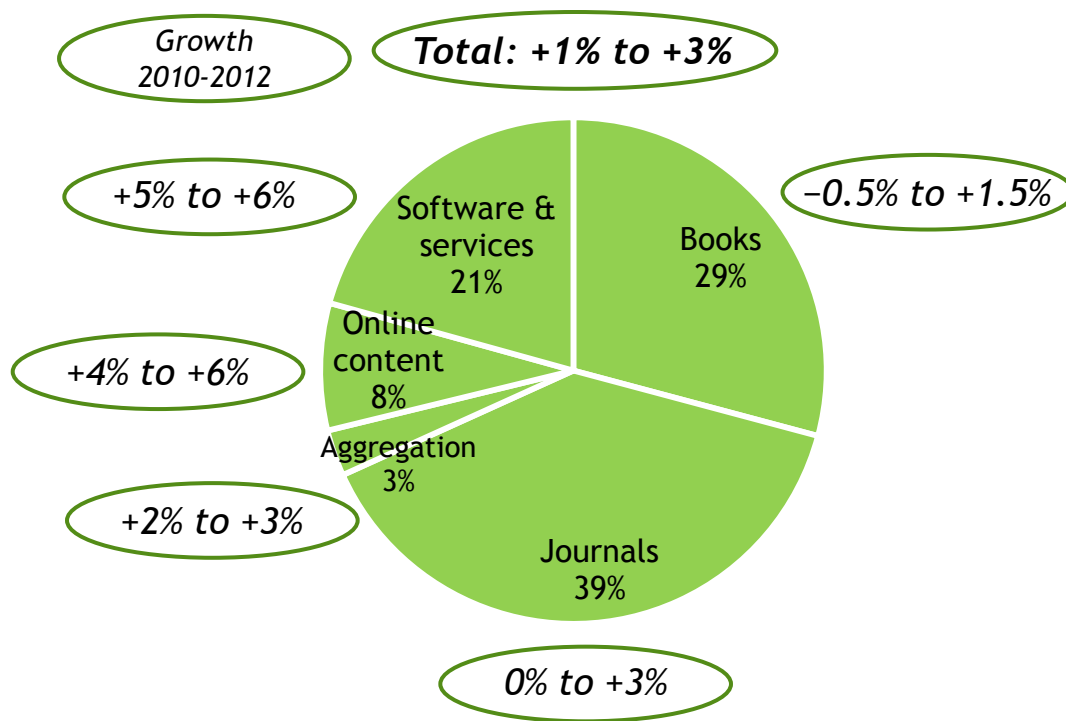
Medical information and solutions market

A large and growing market

Global STM Market 2012
\$24.5 billion



Global Addressable Market
Medical Information & Solutions 2012
\$10.8 billion

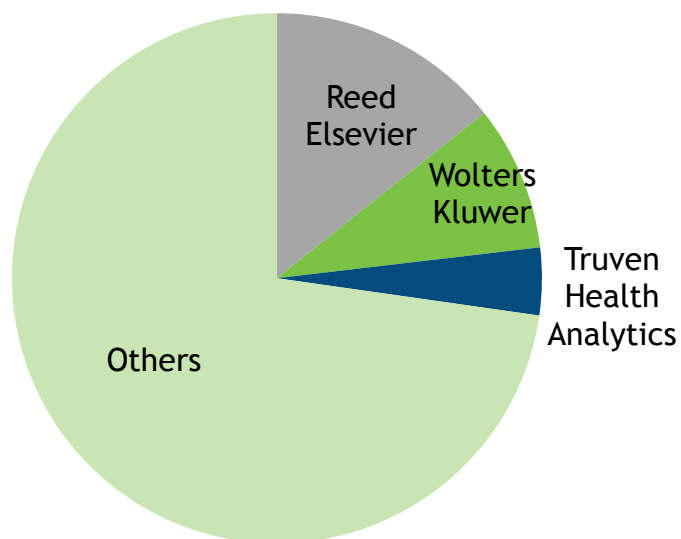


Source: STM market Outsell; Addressable market Simba and Wolters Kluwer

Global leader

#1 in clinical solutions; #2 overall in medical information and solutions

Global Addressable Market
Medical Information & Solutions 2012
\$10.8 billion



Wolters Kluwer Health

Clinical Solutions

- #1 in clinical decision support
- #1 in clinical documentation software
- #1 in clinical drug information
- #1 in clinical informatics and surveillance

Medical Research

- #1 online medical research platform for hospitals and medical schools
- #2 publisher of peer-reviewed medical journals

Professional & Education

- #2 publisher of healthcare education and practice content

Source: Simba, company reports and Wolters Kluwer

Global content

English language medical content highly desired worldwide



Serving healthcare professionals
in over **150** countries



30% of revenues outside North America



Global coverage with a network of
30 field offices, plus distributor channels



More than **570** sales representatives around
the world

Health market trends

Future opportunity is about quality, access and cost



Spiraling global healthcare costs demands need for greater efficiency and productivity

Health spend per capita in OECD rising 5%+ per annum. Health spend now averages 9% of GDP in OECD and has reached 18% of GDP in U.S. (OECD, 2013)



Increased focus on quality outcomes, safety, and health and wellness

Cost of medical errors estimated at \$20bn/year in U.S. (Milliman, 2010)
Cost of waste in U.S. healthcare estimated at \$600-1,300 billion/year (Roberts Woods Johnson)



Worldwide shortage of clinicians drives need for learning and productivity solutions

The biomedical knowledge-base doubles about every 19 years, resulting in a four-fold increase of medical knowledge during a physician's lifetime (Smith)



Growth in medical information and research drives need for curated content and productivity tools

Healthcare IT spend to top \$34 billion in 2014 (Technology Business Research)



Technology and electronic information critical to future market

Wolters Kluwer Health strategy

Investment in products and global reach

Expand
our leading
high growth
positions

Deliver
solutions and
insights

Drive
efficiencies

- Focus investment on Clinical Solutions
- Continue to transform portfolio toward digital
- Expand global reach focusing on key emerging markets

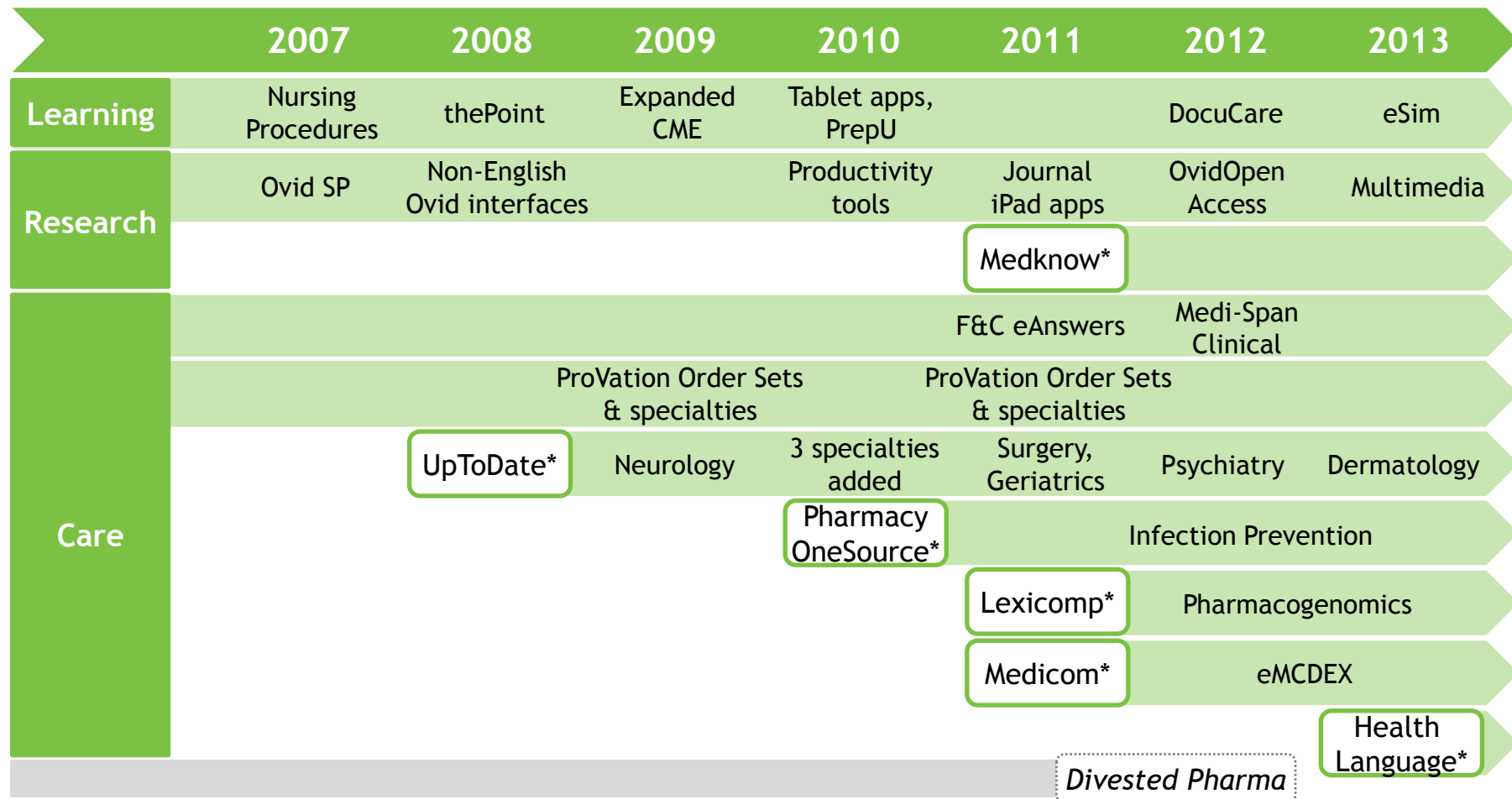
- Develop next generation of point-of-care solutions leveraging our Innovation Lab
- Continue to build out leading content and online offerings

- Pursue efficiencies through select IT outsourcing
- Drive savings in sourcing and real estate

Transformational investment

Portfolio change and consistent organic investment

New Product Launches and Selected Acquisitions

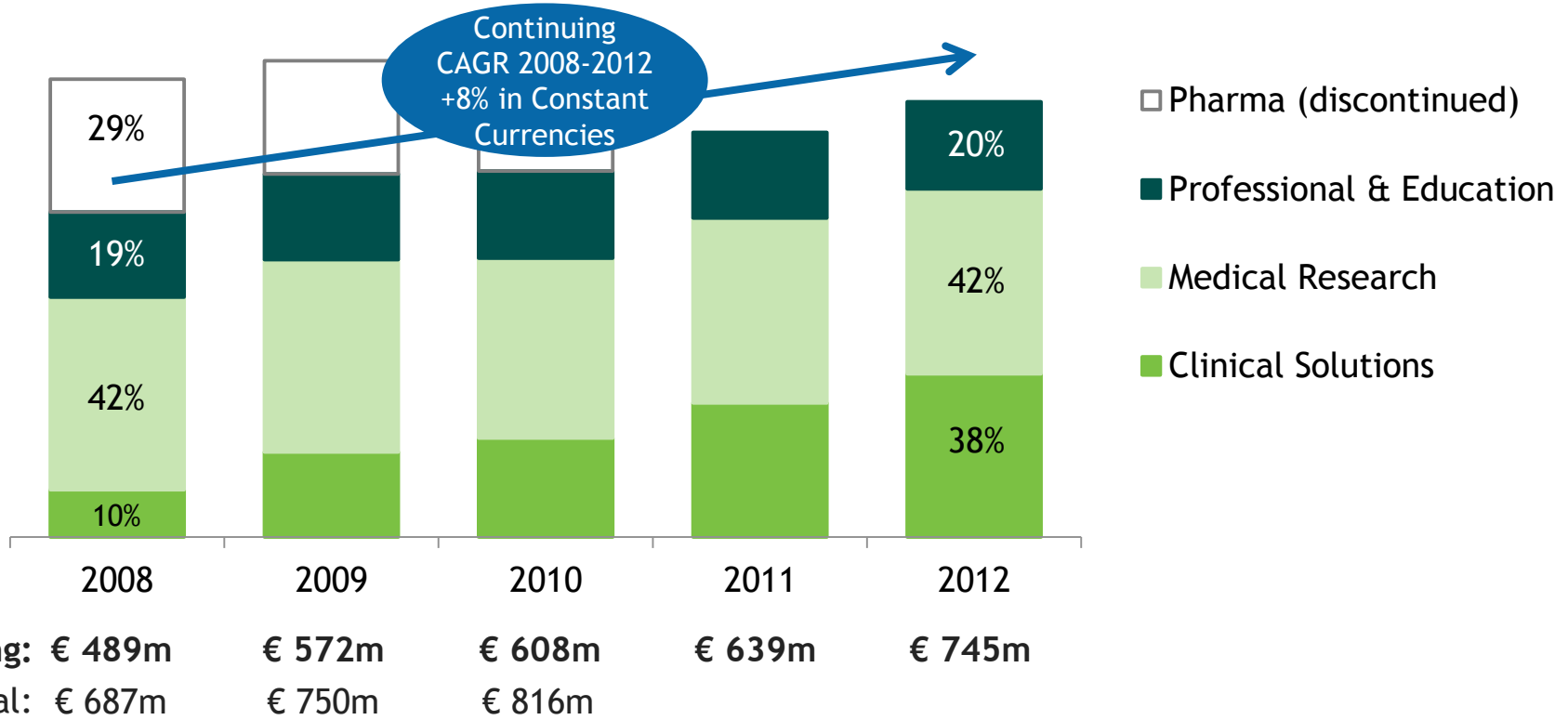


* Year of acquisition

Improving revenue mix

Portfolio rebalancing has positioned Health for growth

Wolters Kluwer Health Revenues (€ million)

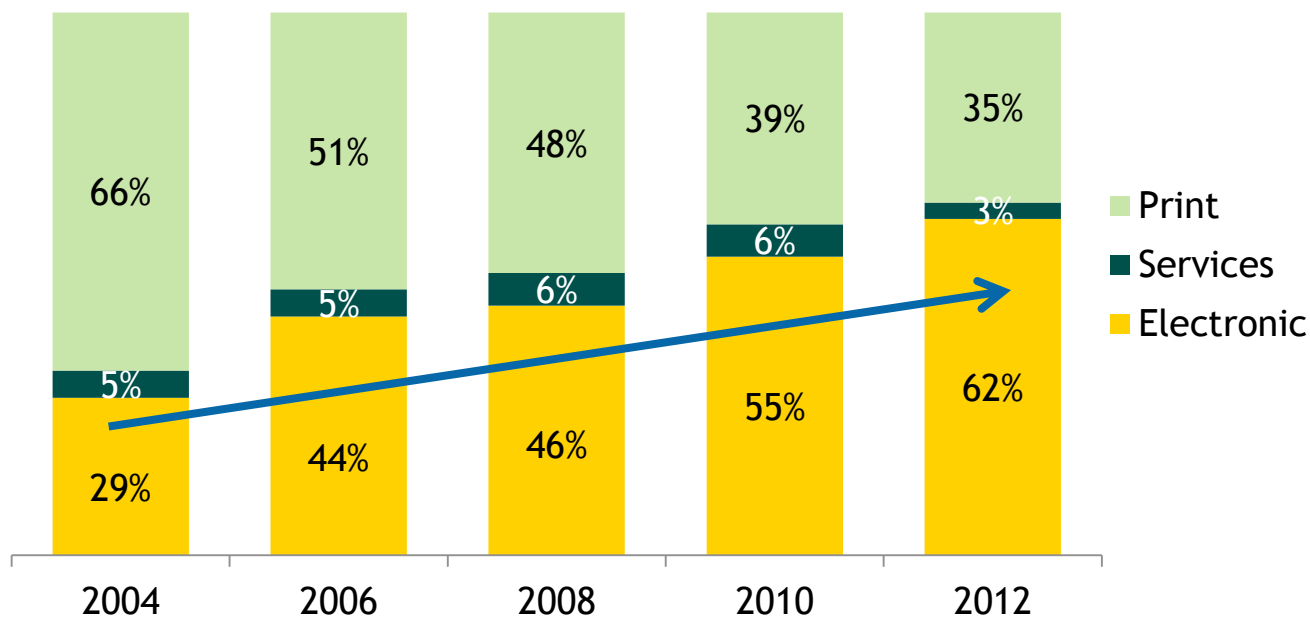


Note: Medical Research includes Ovid and Lippincott Williams & Wilkins journals

Transforming to digital

Investing in digital while managing print decline

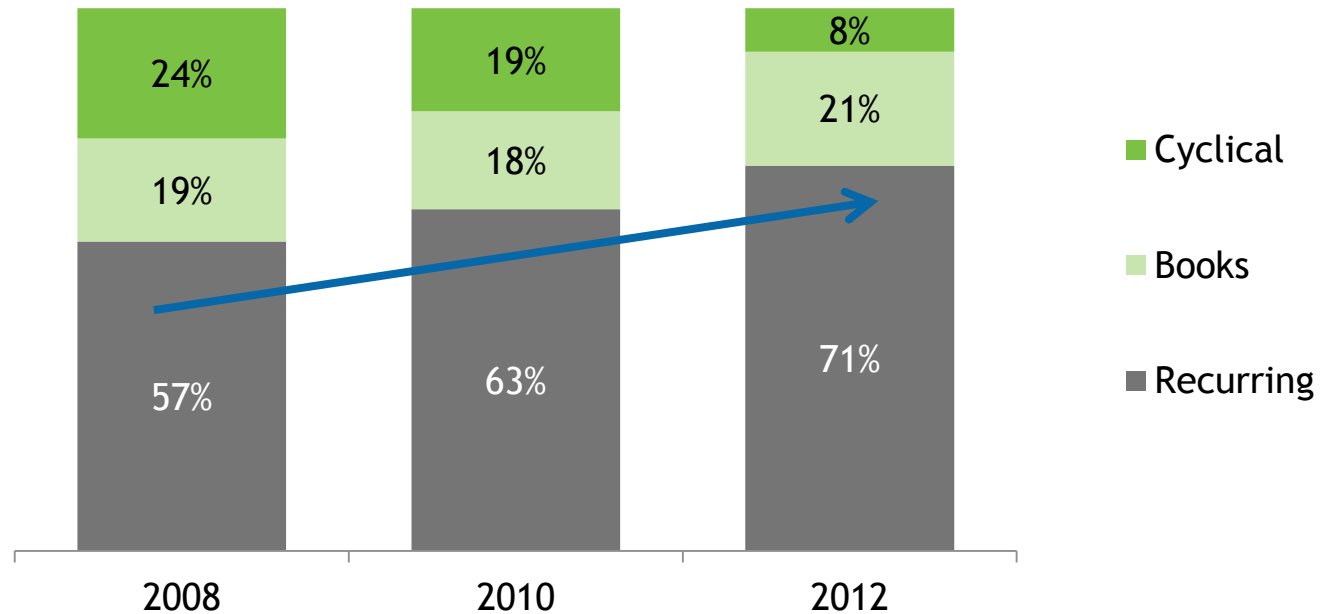
Wolters Kluwer Health
Revenues by Media Format



Increased recurring revenue base

Reduced dependence on cyclical revenue streams

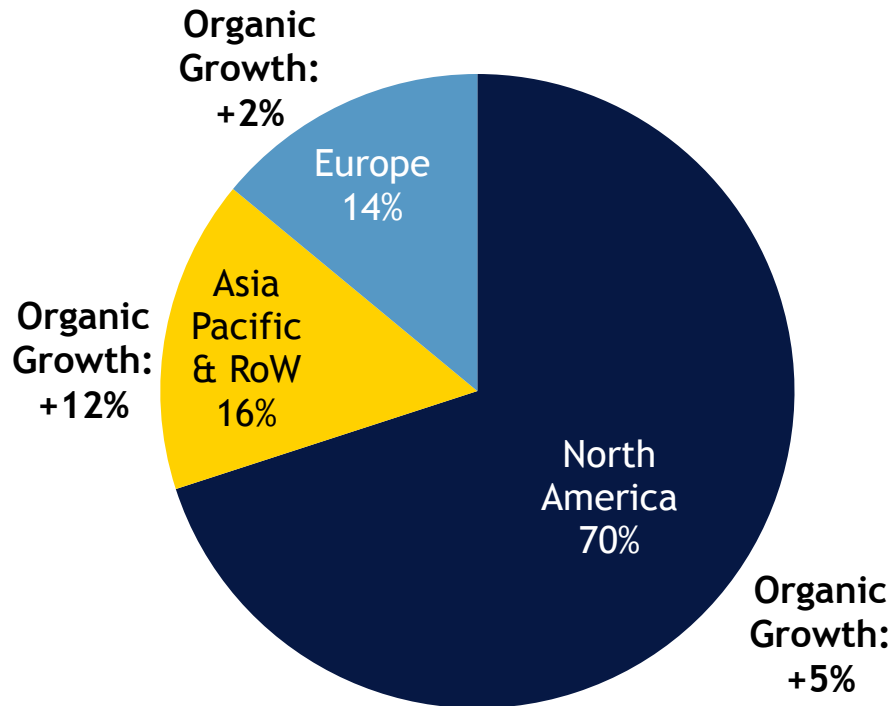
Wolters Kluwer Health
Revenues by Type



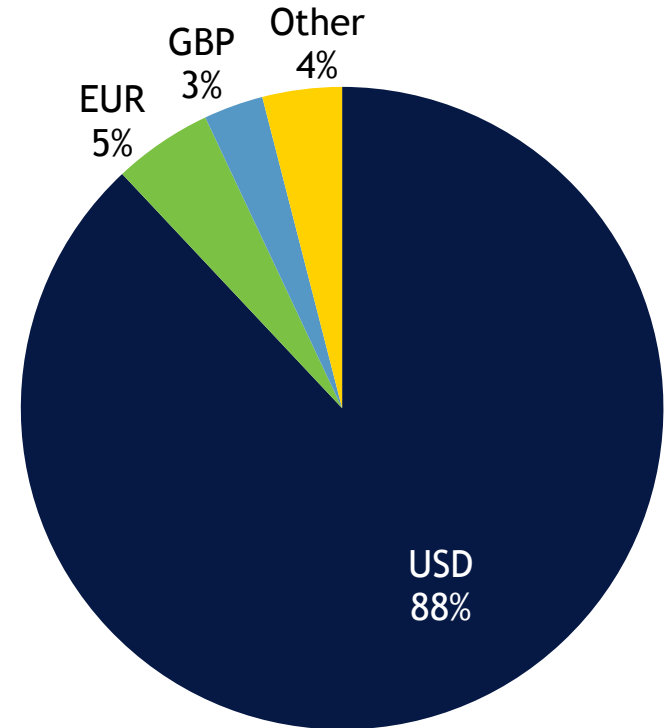
Favorable geographic mix

Strong growth in North America and Asia Pacific

Wolters Kluwer Health
2012 Revenues by Geographic Market

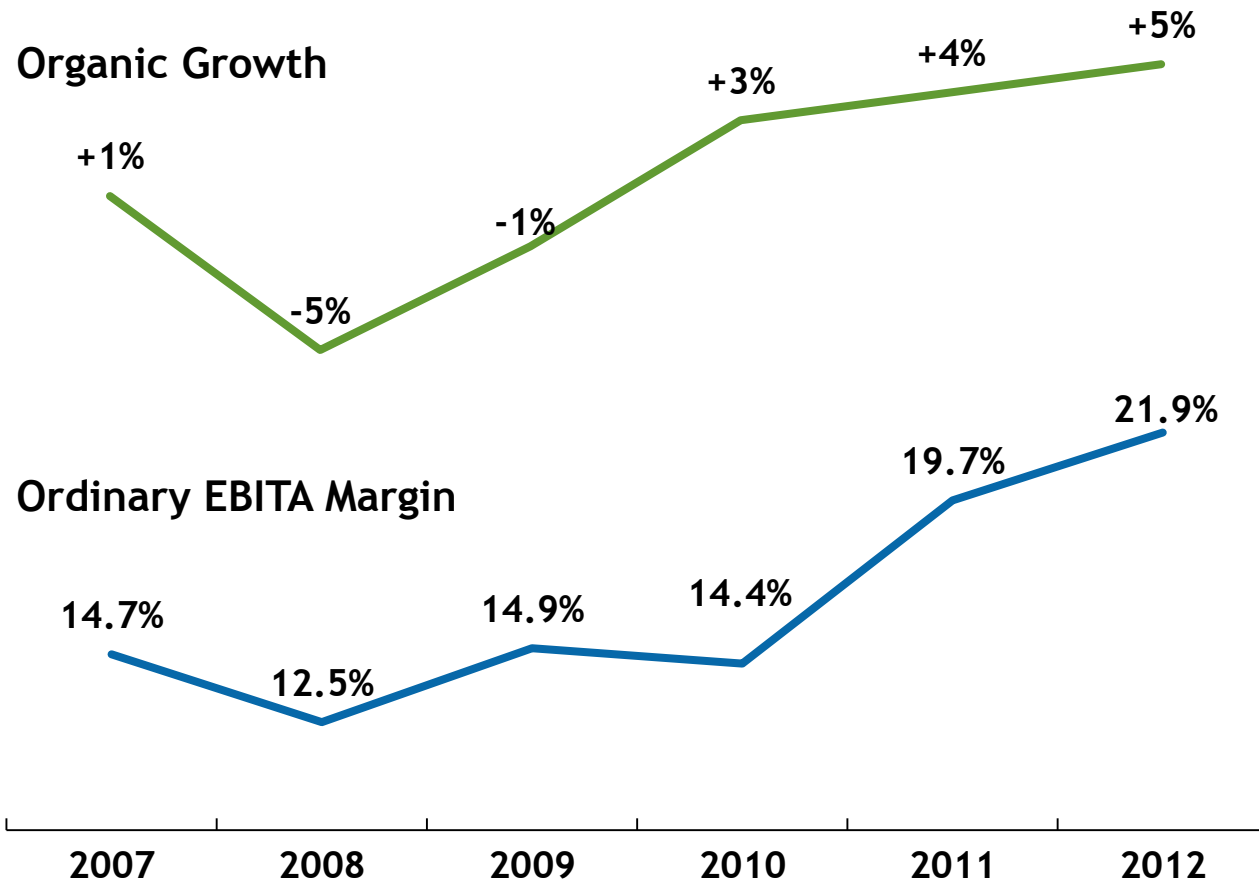


Wolters Kluwer Health
2012 Revenues by Currency



Improved financial performance

Increased organic growth and EBITA margin



Health - Summary

A global leader positioned for growth

Transformed portfolio positioned for growth

Focused on clinicians from learning to practice

Large and attractive addressable market

Leading positions and highly recognized brands

Global reach and opportunity

Improved financial performance

Agenda



Susan Driscoll
President & CEO
Professional & Education



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

Professional & Education

Improving learning and competency in education and practice

Professional & Education

Revenues 2012:
€149 million
20% of Health

Learning

Medical Research



Research

Clinical Solutions



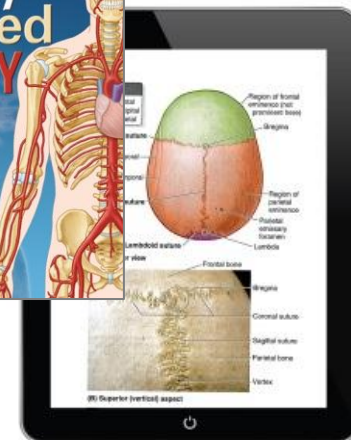
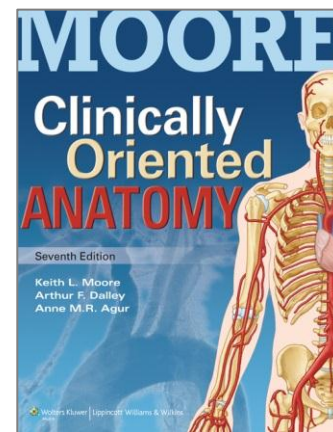
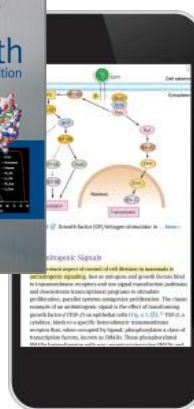
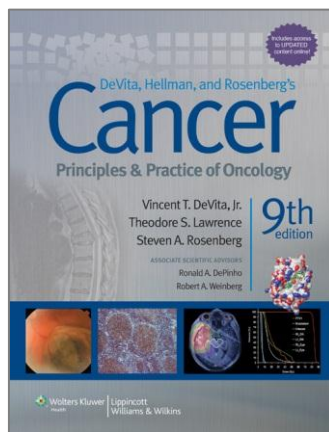
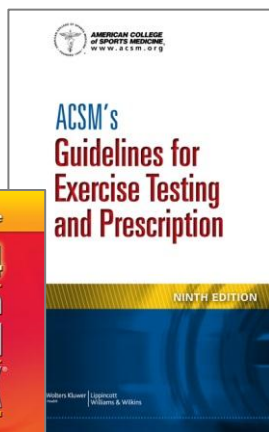
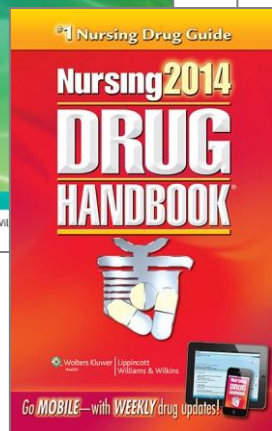
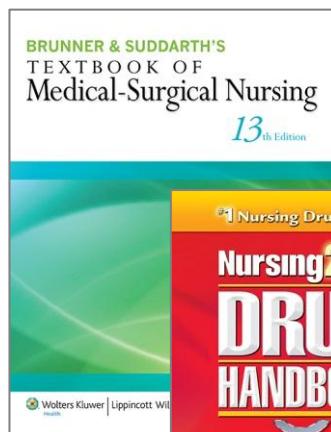
Care

- #2 publisher globally of healthcare education and practice content
- Leveraging position in education and practice to provide lifelong learning
- Transitioning to digital, now approaching 20% of revenues
- Leading brand Lippincott Williams & Wilkins

Trusted medical content provider

Expert content available in all formats

- 2,800 titles across medicine, nursing and allied health
- All frontlist and key backlist available as e-books through most major vendors
- Growing number of digital products, including tablet apps
- Content supports Ovid and Clinical Solutions offerings



Strong market position

#2 publisher globally in medicine, nursing and allied health

Competitive Landscape

Key Markets	Wolters Kluwer	Reed Elsevier	Pearson	FA Davis	McGraw Hill	John Wiley	Cengage Learning
Medical Education	●	●			●		
Medical Practice	●	●			●	◐	
Nursing Education	●	●	●	◐			◐
Nursing Practice	●	●		●			
Allied Health Education	◐	●	●	●	◐		●

Significant global reach

- 25% of revenue outside U.S.
- Content sold in more than 140 countries
- Presence in more than 4,300 medical and nursing schools globally
- More than 1,600 hospitals using our nursing training and information products

Key strengths

Comprehensive and collaborative

Comprehensive

- 2,800 titles in over 100 disciplines
- Presence in 23 medical specialties
- Covering more than 50 subjects in Education

Focused Expertise

- 200+ years dedicated to the healthcare learning
- 7,000+ healthcare professionals contribute to content development and review

Industry Partnerships

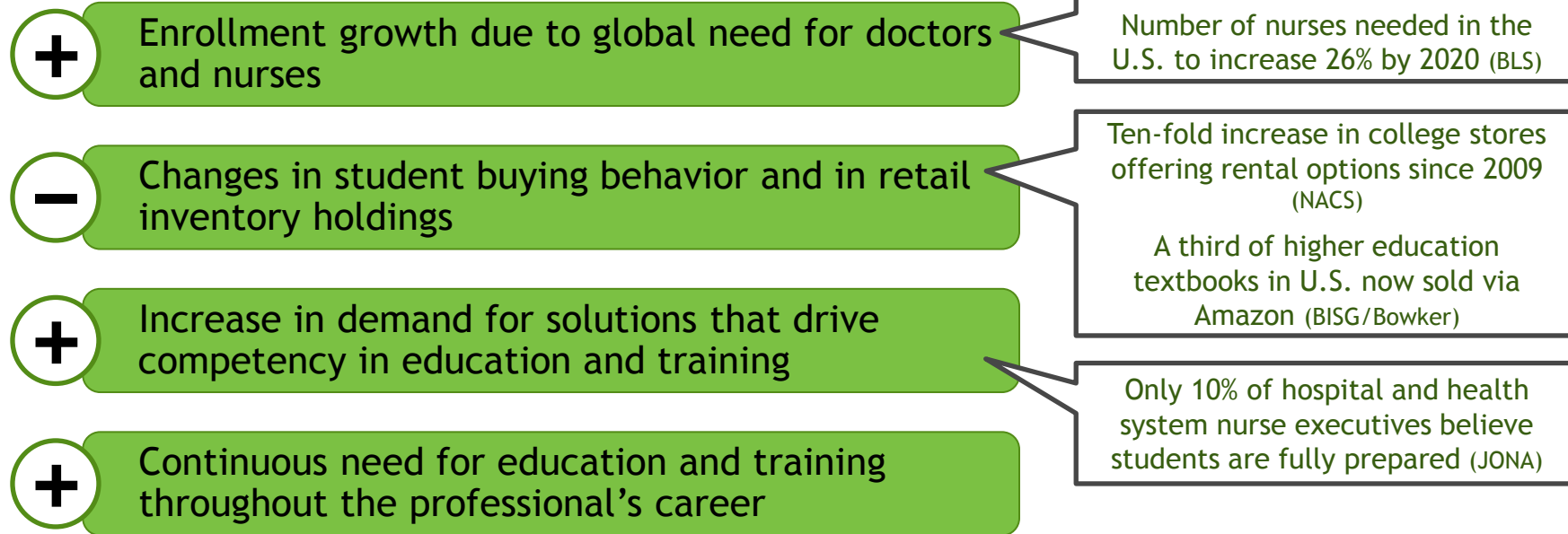
- Laerdal Medical, Healthstream, Optum Ingenix
- Joint Commission Resources, ACSM, AJCC
- Inkling, Silverchair, Kindle, Kno

Digital Offerings

- 1,600+ books available in e-book form
- Digital training products to build skills and competency
- Online reference and learning offerings

Market trends

A market in transition



Professional and Education strategy

Shifting towards digital offerings that improve learning and competency throughout the clinician's career



Expand
our leading
high growth
positions

Deliver
solutions and
insights

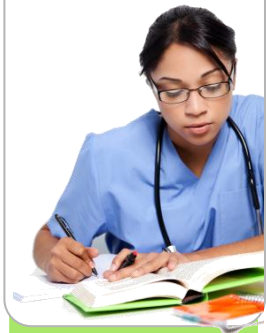
Drive
efficiencies

- **Lifelong learning:** Leverage our strong position across education and practice
- **Build competency:** Continue product transformation to offerings that improve competency in education and training
- **Manage migration:** Pair print with value enhancing electronic features
- **Shift towards institutions:** Continue to shift from individual sales (nurse) to institutional sales (hospital)

Provide lifelong learning

Leverage our position in education and practice to transform learning

Textbooks



Old way:
The nurse learned through textbooks, but was unprepared to practice when graduated

Practice

New way:
The nurse's education is supplemented with practice-based learning to ease into confident career growth



Evidence based procedures

Skills training

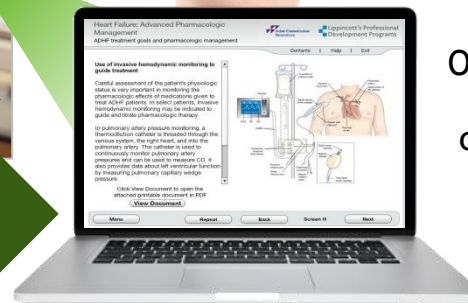


Quick lists of essential steps, competency tests and skills checklists

Patient-centered learning

Practice & continued learning

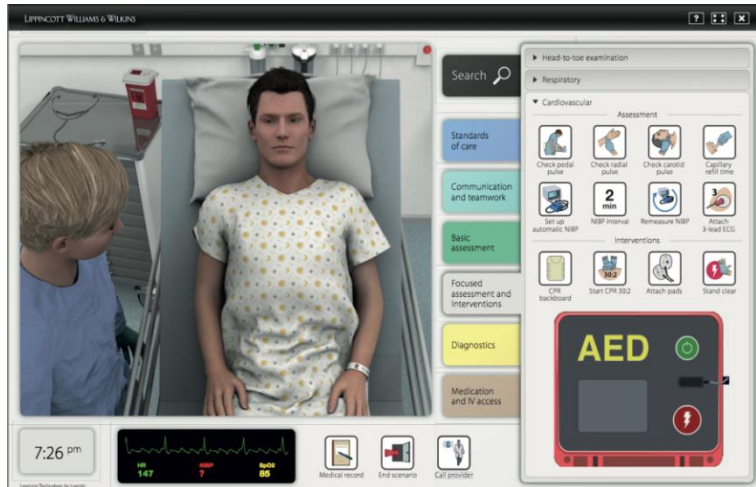
Support in practice Bedside patient support



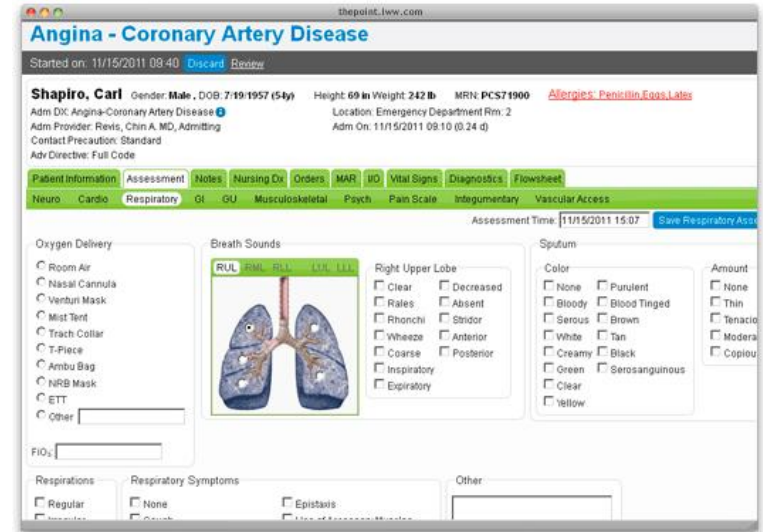
Onboarding and continued learning

Build competency

Video and software products lead to quality care



eSim Patient-Centered Learning



DocuCare™ Educational Electronic Health Record

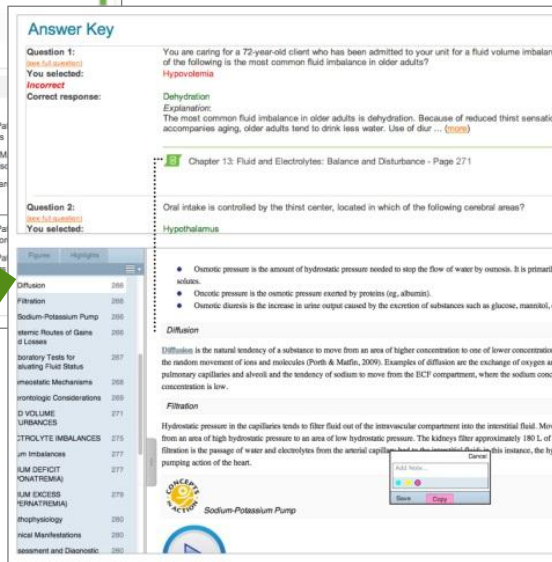
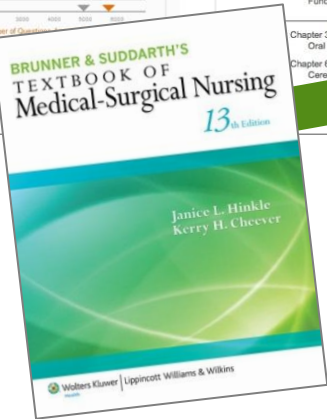
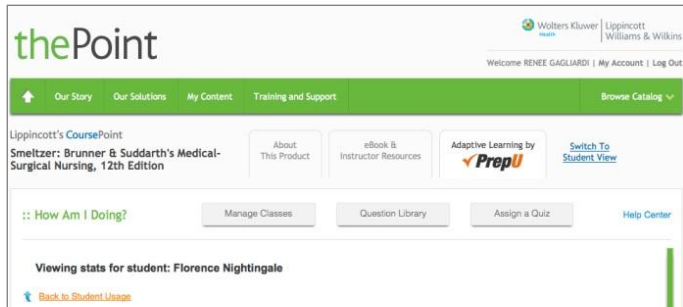
In 15 months reached: 200 adoptions;
2,700 faculty members;
16,000 students



Taylor's Video Guide to Clinical Nursing Skills

Build competency

PrepU usage leads to licensing and certification



160 million questions have been answered within PrepU products



78,000 nursing students at nearly 1,000 programs are using PrepU



98.7% pass rate for nursing students who used PrepU to prepare for their NCLEX-RN licensure exam



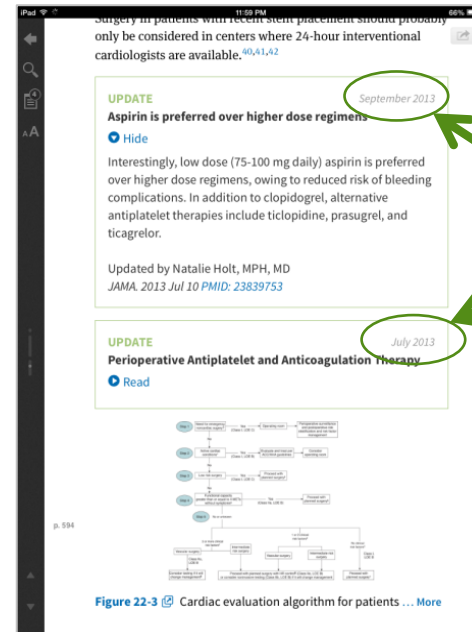
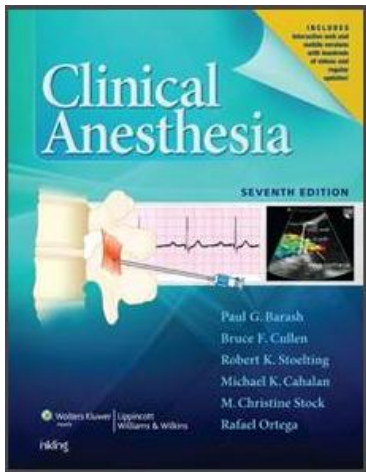
Book and practical practice content now embedded in subscription solutions



Manage migration

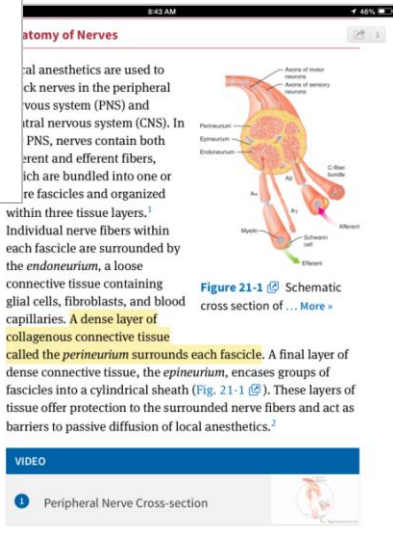
Interactive mobile offerings for students, residents and practicing clinicians

Print → Digital
Greater customer value



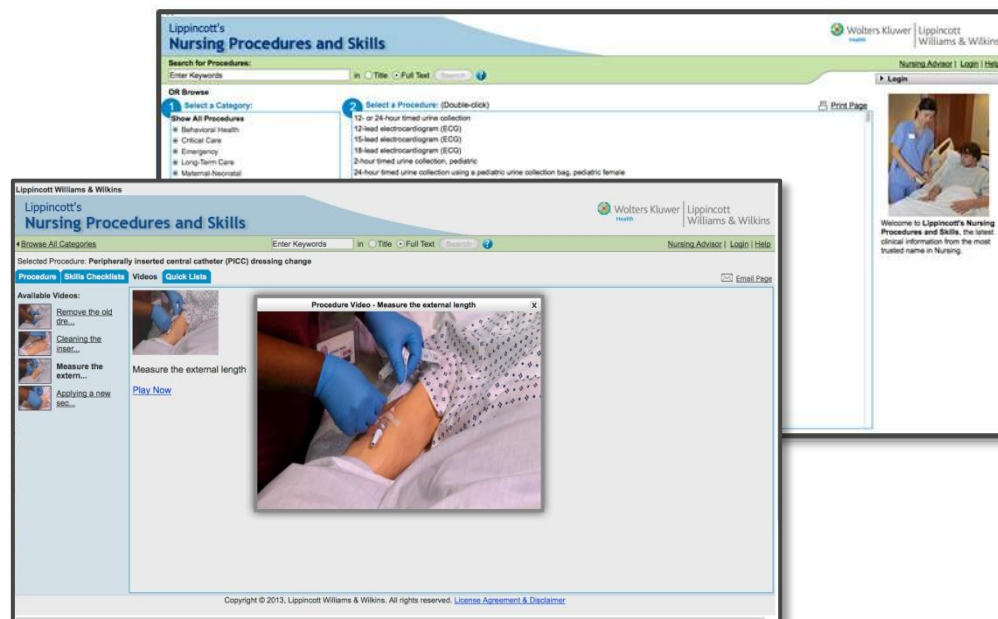
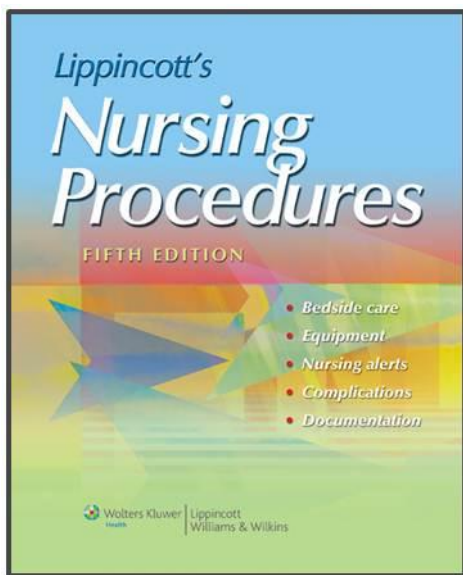
Frequent content updating

Personalize and share



Shift towards institutions

Lippincott Nursing Procedures adds value and opens door to institutional sales



Reference book

- Leading content
- Sold to the nurse

Online

- Same leading content as in print offering
- Offered online
- Enhanced with video and images
- Customizable
- Sold to the institutions on subscription basis

Professional & Education - Summary

Leveraging our position across the lifecycle as we migrate to digital

#2 publisher and premier brand in medical, nursing, and allied health

Strategy based on lifelong competency: “Learning Never Ends”

Transformation is underway which will improve the business model:

Product migration: Books to innovative skills-based solutions

Customer migration: From individuals to institutions

Business model migration: Single purchase to subscription

Agenda



Catherine Wolfe
President & CEO
Medical Research



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

Medical Research

Provide high quality, relevant medical content and precision search

Professional & Education



Learning

Medical Research

Revenues 2012:
€316 million
42% of Health

Research

Clinical Solutions



Care

- #1 online medical research platform in hospitals and medical schools with Ovid
- Significant global brands and field sales presence
- 60% digital and 80% recurring revenue
- Exclusive Lippincott Williams & Wilkins medical and nursing content

Trusted, relevant content and precision search

Sold to institutions and used by healthcare professionals

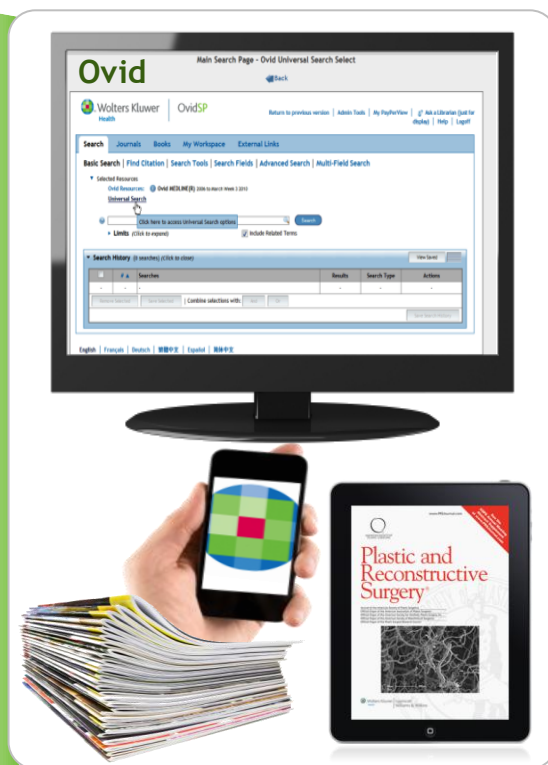
Premium Content

Lippincott,
Williams &
Wilkins
Exclusive access

3rd Party
Content & tools

Medknow
Open access

Consumption & Delivery Channels



Customers/Users



Hospital



Medical / Academic
School



Government



Corporate



Physicians



Nurses



Students, Educators



Librarians



Researchers



Information
Managers

Scholarly research and peer review

Ovid speeds and simplifies research

Increased value as growth of medical content continues



Use case - Physician:

What are the drug therapies for rheumatoid arthritis if a patient also has congestive heart?

- ✓ *Ovid advantage: Search multiple clinical evidence databases: EBMR, Embase, Ovid Medline to check case reports, systematic reviews*

Use case - Medical Student:

Resident watches podcasts and videos to prepare for a new clinical rotation

- ✓ *Ovid advantage: Multimedia content within clinical workflow*



Use case - Medical Librarian:

Embedded with a oncology team, librarian creates expert search strategy as part of a systematic review on stem cell transplants

- ✓ *Ovid advantage: Breadth of evidence based content & search tools to pinpoint topics in literature; search alerts keep team informed on latest research*

A global leader

Comprehensive position in medical content and delivery

Competitive Landscape

Key markets	Wolters Kluwer (Ovid platform)	Reed Elsevier (Science Direct)	EBSCO (EBSCOhost)	ProQuest (ProQuest)	Wiley (Wiley Online Library)	Springer (SpringerLink)
Global Medical Aggregation Platform	■		■	■		
Medical and Nursing Journal Content (print & online)	■	■			■	■

- Leading brands
- Superior search:
 - Ovid leads in Net Promoter Score (NPS)
- Exclusive proprietary and critical 3rd party content
- Global footprint:
 - 48% of revenue outside U.S.
 - 12,500 institutions globally

Key strengths

Comprehensive and global

Comprehensive

- Exclusive access to Lippincott's nearly 300 journals and over 1,400 books
- Depth & breadth of content/tools: 10,700+ resources
- Access to 300+ Medknow open access titles

Global Penetration

- 12,500 institutional customers in 186 countries
- 150 sales reps, 60+ support team, 26 global offices
- 21 native languages spoken by sales/customer service

Industry Partnerships

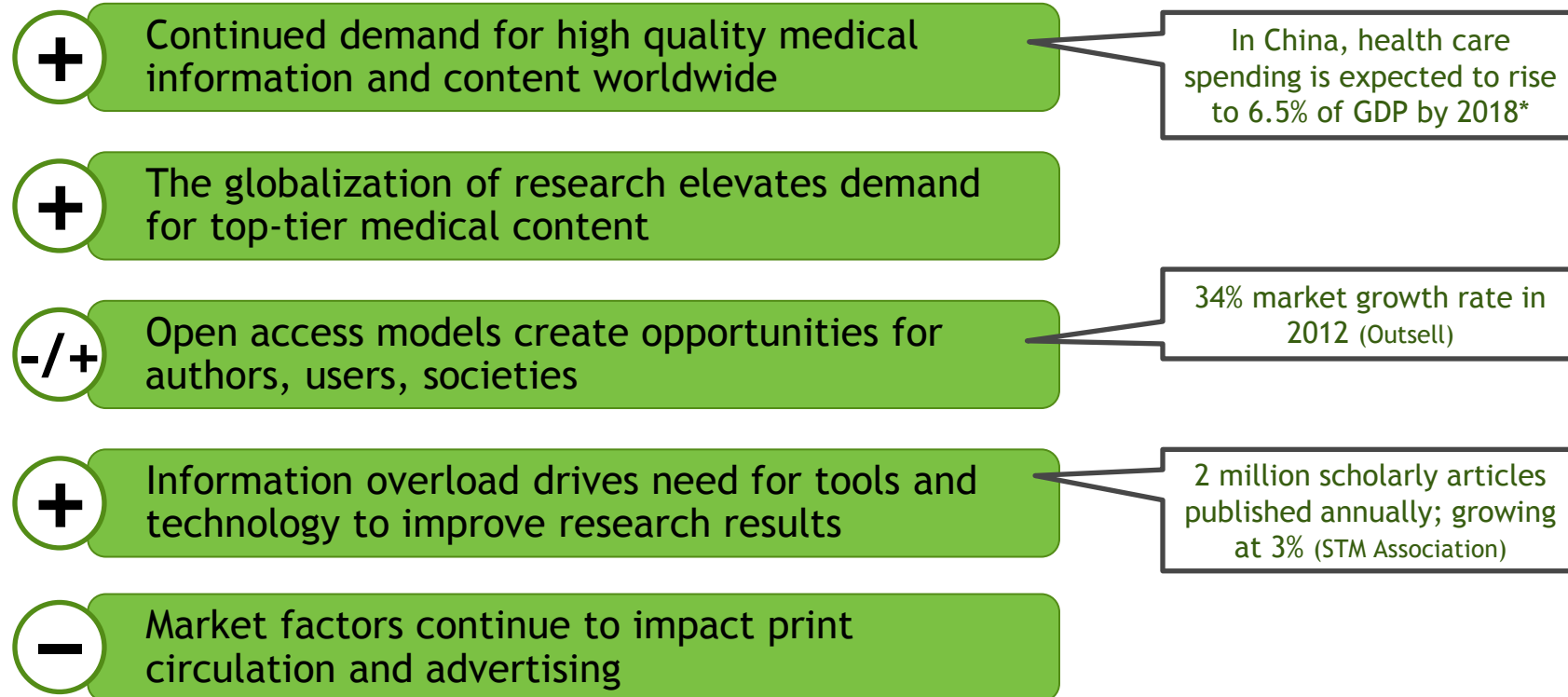
- 80 society partnerships, 111 society titles
- 150+ partnerships with 3rd party publishers
- Strong performance with 3rd party content

Critical Resource

- Unparalleled search precision: Ovid Medline
- 132 million Ovid sessions/year; 1,000 sessions/minute
- Industry award winning customer/technical support

Market trends


Continued demand for high quality medical content and tools



*Source: China's Health Development Statistics Bulletin 2011

Medical Research strategy

Investing in content and technology while migrating print



Expand
our leading
high growth
positions

Deliver
solutions and
insights

Drive
efficiencies

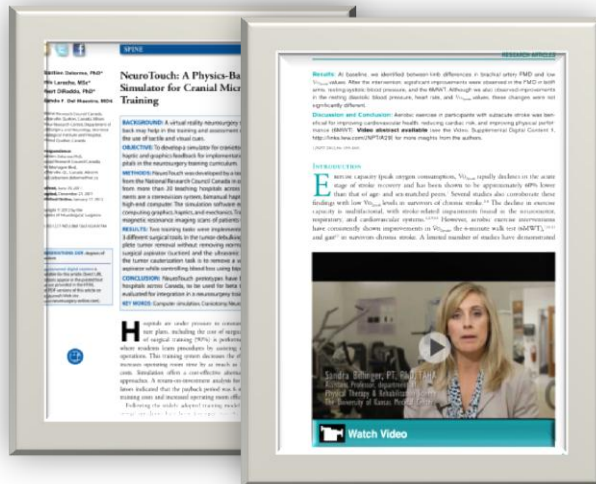
- **Leverage scale:** Leverage Ovid's global scale to attract content partners
- **Enhance user experience:** Invest in technology and mobile solutions to improve customer productivity and access to information
- **Build out content:** Continue to build out world-class content portfolio across markets and disciplines including evidence-based practice resources
- **Manage format migration:** Deepen user engagement with content through digital transformation
- **Expand into emerging markets:** Global expansion in emerging markets, particularly China, India and the Middle East, driven by Medknow's open access publishing platform

Enhance user experience

Improve discoverability, mobility and productivity tools

Integrating Ovid search to enrich users' practice

- ✓ Saves time; one search across multiple content types
- ✓ Currency when needed; eTOCs alerts, RSS feeds on latest published research
- ✓ Strengthen knowledge at point of need; Quick access to images, case reports, etc. to support decision-making



Digital access supports enhanced reader engagement

- ✓ Multi-media video, audio and images embedded into articles
- ✓ Peer-sharing email links w/ every article
- ✓ Advertisers using interactive ads

Build out world class content

Focus on high-quality content targets to strengthen positions



- LWW journals are highly ranked titles, many in the top quartile of their specialty
- Maintain leadership through targeted society partnerships in core disciplines
 - Surgery, neurology, oncology, dermatology

- Build on Ovid's portfolio of premium content
 - Ovid offers 4 of 7 leading evidence-based practice resources (Outsell)
 - JBI tools help clinicians to research and evaluate practice to improve outcomes
 - Amirsys tool to target radiologists

Appraisal & Implementation

- JBI JOURNAL CLUB**
Create your own Journal Club and keep up to date with the latest research in a social and relaxed environment.
- JBI RAPid**
Learn how to critically appraise individual research papers using a standardised checklist.
- JBI SUMARI**
Develop, conduct and report on systematic reviews of multiple research papers.

Conduct Systematic Reviews & Critical Appraisal

Expanding into Emerging Markets

Medknow open access publishing platform

- Medknow partners with 230+ societies across 20 countries
- All articles are peer reviewed by our society partners
- Focuses on India, China, Middle East and Africa
- Supports publishers and authors looking to increase visibility and global reach
- Circa 4 million full text downloads monthly from Medknow sites
- Medknow readership top countries: India, U.S., United Kingdom, Canada, Australia
- Extending content discoverability and value to researchers on Ovid



Medical Research - Summary

Accelerating healthcare knowledge globally

#1 medical research platform in hospitals and medical schools globally

Leverage global footprint and market insight to pursue growth markets, attract partners and customers

Provide comprehensive and exclusive medical content through state-of-the-art delivery channels to meet increased demand

Deepen user engagement through investments in content and technology

Agenda

Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

15 MIN BREAK

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A



Agenda



Arvind Subramanian
President & CEO
Clinical Solutions

Introduction

Overview of Health Division

Professional & Education

Medical Research

Break



Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

Clinical Solutions

Improving quality and outcomes at the point-of-care

Professional & Education



Learning

Medical Research



Research

Clinical Solutions

Revenues 2012:
€280 million
38% of Health

Care

- #1 in key point-of-care segments
- Unique combination of proprietary software and online medical content embedded in the clinical workflow
- Trusted by hundreds of thousands of clinicians daily around the world
- 90% digital and 90% recurring revenue
- Consistent double-digit revenue and EBITA growth since 2009
- Global expansion underway

Key strengths

Key strengths provide sustainable competitive advantage

Deep Domain Expertise

- Staff includes 96 physicians, 50 pharmacists (35 Ph.D.'s), 25 nurses and reimbursement coders
- “Designed by clinicians for clinicians”
- Management team has 180 years of collective healthcare experience

Trusted Point-of-Care Products

- Leading brands in key point-of-care market segments
- Offerings rated #1 by KLAS (Leading U.S. healthcare IT ratings firm)
- 1M+ clinical users (physicians, pharmacists, nurses) in 158 countries

Proprietary Content

- Massive accumulated proprietary disease, drug and informatics content, continuously refreshed by uniquely skilled clinical teams
- 5,100 member external physician authoring network

Advanced Technology

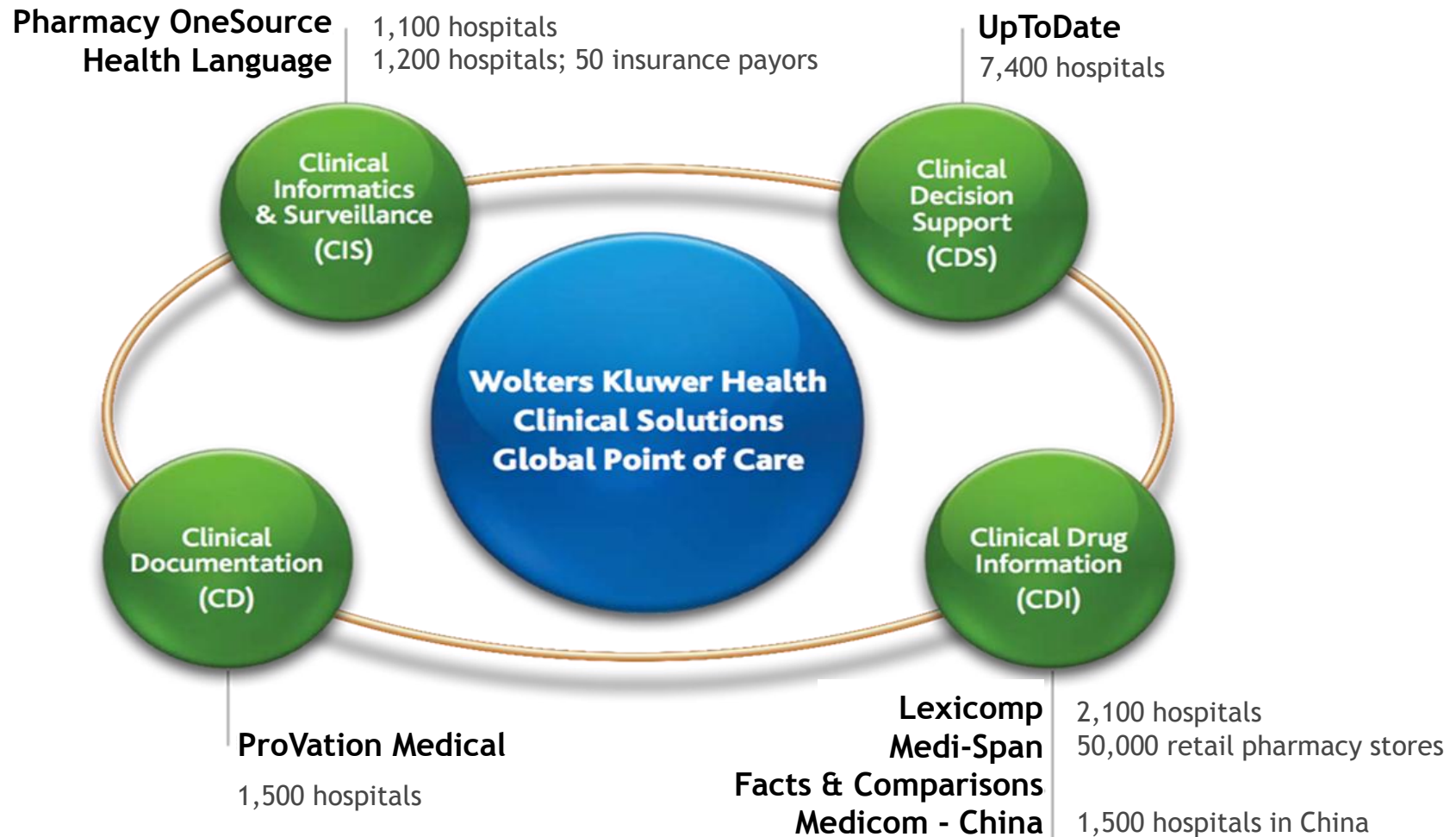
- World-class capabilities in software, embedded medical content, healthcare IT systems integration, user interface, informatics
- Staff includes 200 software engineers plus Tata team in India

Customer Depth & Breadth

- Installed base in 3,500 U.S. and 4,000 non-U.S. hospitals
- 50,000 U.S. retail pharmacy stores
- 50 insurance payors

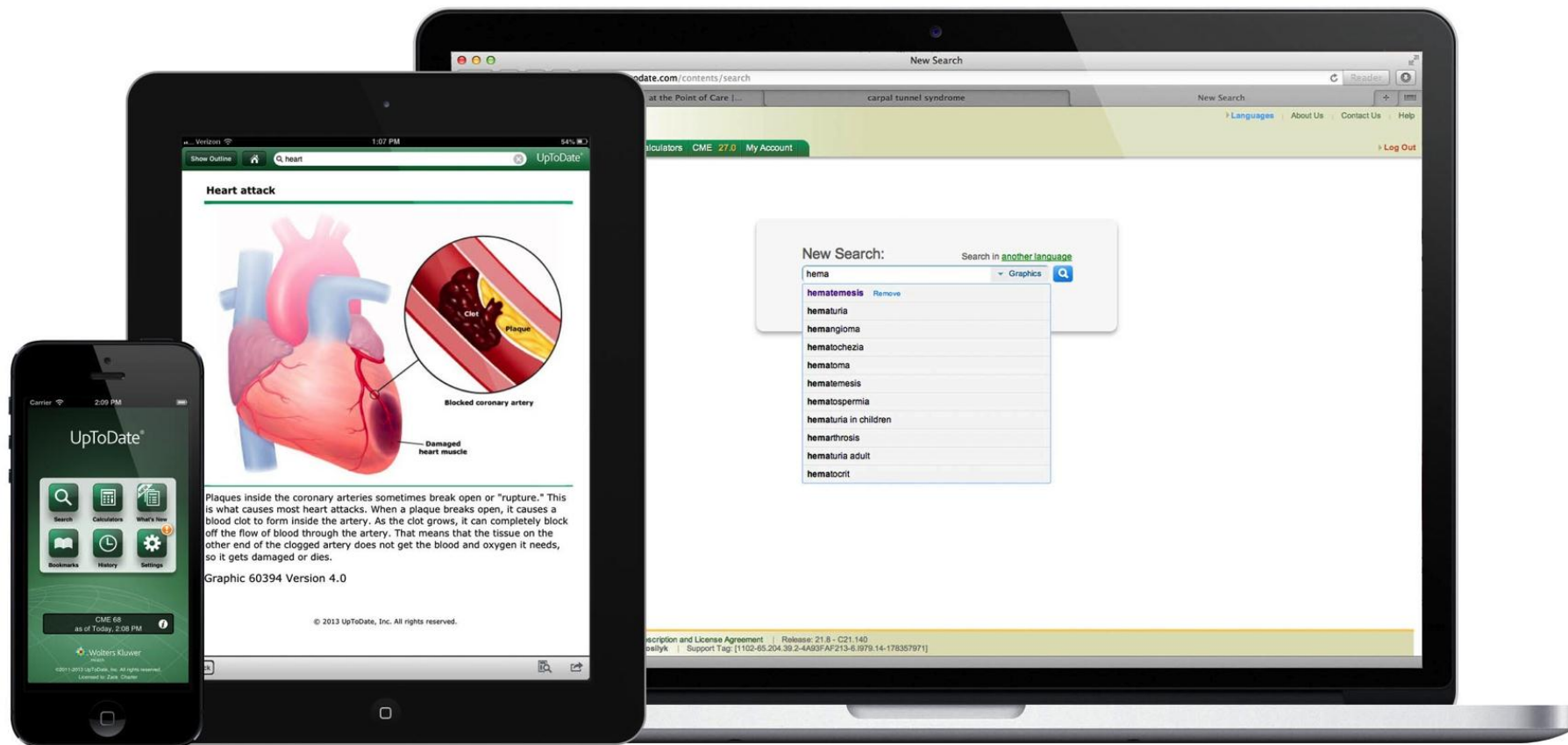
Offerings by market segment

Leading and trusted products in key point-of-care segments



Clinical Decision Support

UpToDate enables diagnosis and treatment at the point-of-care



Clinical Drug Information

Comprehensive content and software for hospitals and retail pharmacies

■ Medi-Span

- Comprehensive drug information databases and software for dosing, therapy, drug-drug interactions, alerts, pricing etc.
- Embedded in the Electronic Medical Record (EMR) and pharmacy systems for hospitals and retail pharmacy stores

■ Lexicomp

- Referential drug information for physicians, nurses, pharmacists in hospitals

■ Facts & Comparisons

- Referential drug information for pharmacists in retail pharmacies

■ Medicom China

- Leading drug database and referential drug information provider for China

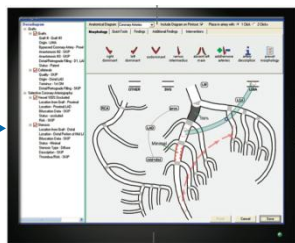


Clinical Documentation

ProVation software drives clinical productivity, quality and savings



Dictation



ProVation MD

- **ProVation MD: From dictation to software documentation process**
 - Deep medical content drives appropriate documentation
 - Documentation drives appropriate reimbursement (CPT/ICD-9/ICD-10)
 - Operational efficiencies and reimbursement drive strong customer ROI

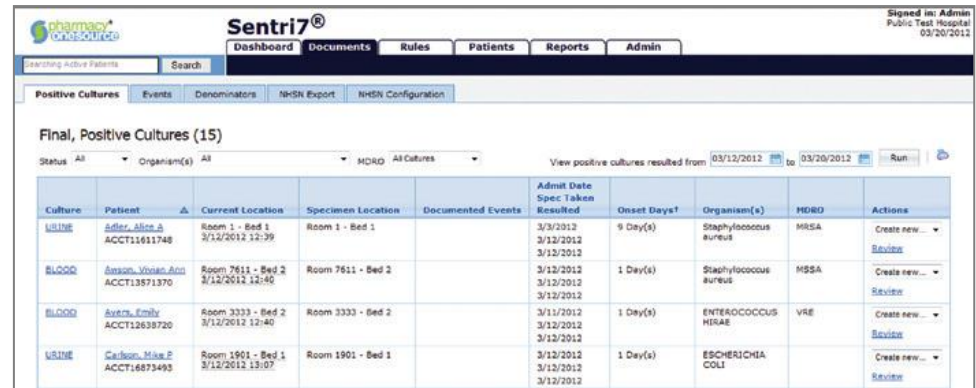
- **ProVation Order Sets: From paper to software driven process**
 - Software platform with deep medical content library with hundreds of pre-defined and customizable order sets
 - Linked to the Evidence Based Medicine in the UpToDate treatment topics

Clinical Informatics & Surveillance

Products improve quality, safety and interoperability of systems

■ Pharmacy OneSource:

Software application with a sophisticated surveillance rules engine that helps hospitals identify at-risk patients and recommends clinical interventions

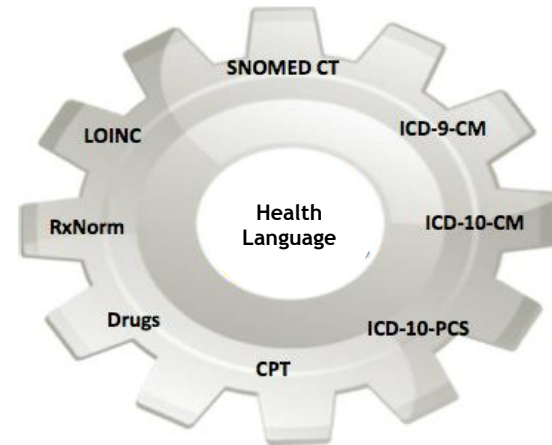


The screenshot shows the Senti7 interface with a table titled "Final, Positive Cultures (15)". The table lists patient information, current and specimen locations, documented events, admit dates, onset days, organisms, and actions.

Culture	Patient	Current Location	Specimen Location	Documented Events	Admit Date Spec Taken Resulted	Onset Days†	Organism(s)	MRSA	Actions
URINE	Adler, Alice A ACCT11681748	Room 1 - Bed 1 3/12/2012 12:39	Room 1 - Bed 1		3/3/2012 3/12/2012 3/12/2012	9 Day(s)	Staphylococcus aureus	MRSA	Create new... Review
BLOOD	Benson, Vivian Ann ACCT13571370	Room 7611 - Bed 2 3/12/2012 12:40	Room 7611 - Bed 2		3/12/2012 3/12/2012 3/12/2012	1 Day(s)	Staphylococcus aureus	MRSA	Create new... Review
BLOOD	Ayers, Emily ACCT12638720	Room 3333 - Bed 2 3/12/2012 12:40	Room 3333 - Bed 2		3/11/2012 3/12/2012 3/12/2012	1 Day(s)	ENTEROCOCCUS HIRAE	VRE	Create new... Review
URINE	Carlson, Mike P ACCT16873493	Room 1901 - Bed 1 3/12/2012 13:07	Room 1901 - Bed 1		3/12/2012 3/12/2012 3/12/2012	1 Day(s)	ESCHERICHIA COLI		Create new... Review

■ Health Language:

Software applications to facilitate information sharing among disparate clinical systems providing the foundation for analysis and reimbursement




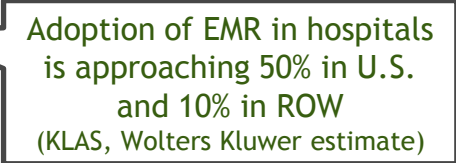
A global leader

Leading position in key segments of point-of-care

Clinical Solutions point-of-care		Wolters Kluwer	Hearst	Truven	Ebsco Dynamed	BMJ	Reed Elsevier	Others
Segment	Sub-segment							
Decision Support		●		◐	◐	◐		
Drug Information	Embedded Databases	●	●					Multum ◐
	Retail Pharmacy	●					◐	
	Hospitals	●		●				Epocrates ◐
Documentation	Order Sets	●	◐				○	
	Procedures	●						Dictation /EMRs ◐
Informatics & Surveillance	Surveillance	●		◐				Theradoc MedMined ◐
	Terminology Management	●						IMO Apelon 3M ◐


Market trends

Global healthcare trends are favorable for the point-of-care

-  Increased measurement and focus on quality and outcomes to drive down healthcare costs 
-  In the U.S., Meaningful Use legislation drives adoption of electronic medical records and other technologies 
-  Government healthcare system improvement programs in China, Middle East, Australia, Brazil
-  Shortage of clinicians drives demand for productivity 
-  Care shifts to population wellness and disease management over time

Clinical Solutions strategy

Five core elements driving double-digit global growth at the point-of-care



Expand
our leading
high growth
positions

Deliver
solutions and
insights

Drive
efficiencies

- **Drive penetration:** Continue to drive growth through increased penetration of existing offerings both domestically and internationally
- **Expand offerings:** Expand existing offerings with new content modules (e.g. by specialty) and innovative form factors (e.g. mobile)
- **Invest in innovation:** Continue to invest in the Clinical Solutions Innovation Lab to develop new offerings by leveraging all Clinical Solutions assets
- **Invest in sales, service & marketing:** Continue to scale these volume driven functions and leverage distributors in select geographies
- **Sustain process excellence:** Continued process enhancements in all functions ensures customer responsiveness and expands margins

Clinical Solutions Innovation Lab

R&D venue to experiment and develop future offerings with customers



- Engaged with 14 customers on 8 projects
- Best ideas move out of Lab into commercialized products following structured process
- Innovation Lab leverages resources from across Clinical Solutions and includes 6 dedicated resources to manage various initiatives

Building disease management solutions platform

New value creation leveraging large installed base

**Disease Management
Solutions Platform
(DMSP)**

Sepsis | CHF | Diabetes | Stroke | Asthma | Migraine | Pneumonia



Focus on Sepsis

Leading cause of death worldwide with high cost to treat and manage

- Sepsis is a potentially fatal whole-body inflammation (a systemic inflammatory response syndrome or SIRS) caused by severe infection
- Sepsis affects at least 750,000 people each year in the U.S. alone
 - Every hour raises the risk of death by 8% if sepsis is untreated
 - Approximately 215,000/year die in the U.S.; 37,000/year people in the UK
- The total hospital costs associated with the care of patients who incurred severe sepsis is \$16.7 billion in the U.S. alone
 - Sepsis is not a reimbursable event, so cost of care has significant financial impact on hospitals

Sepsis application leverages all Health assets

Comprehensive solution for early identification and treatment of Sepsis



Offering will comprise:

- Web & mobile software incorporating disease-based programs, rules, algorithms and predictive analytics
- Change management consulting services

Clinical Solutions - Summary

Well positioned for continued strong growth at the point-of-care

Leading positions in all key market segments driving double-digit revenue and EBITA growth

Intuitive software applications with embedded medical content

Continuously updated drug and disease information on-line offerings

90% digital and 90% recurring revenue

Expanding in the U.S. and globally driven by favorable market trends

Repeatable research & development process through Innovation Lab

Agenda



Dr. Denise Basow
VP & GM
UpToDate



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

What is UpToDate?

Mission:

Improve the quality of healthcare worldwide by answering clinical questions at the point-of-care

We are solving an important problem:

- The volume of medical literature is too vast and complex for the average clinician to master
- Clinicians have questions that occur at the point-of-care and answering these questions in an Evidence-Based way can impact decision making

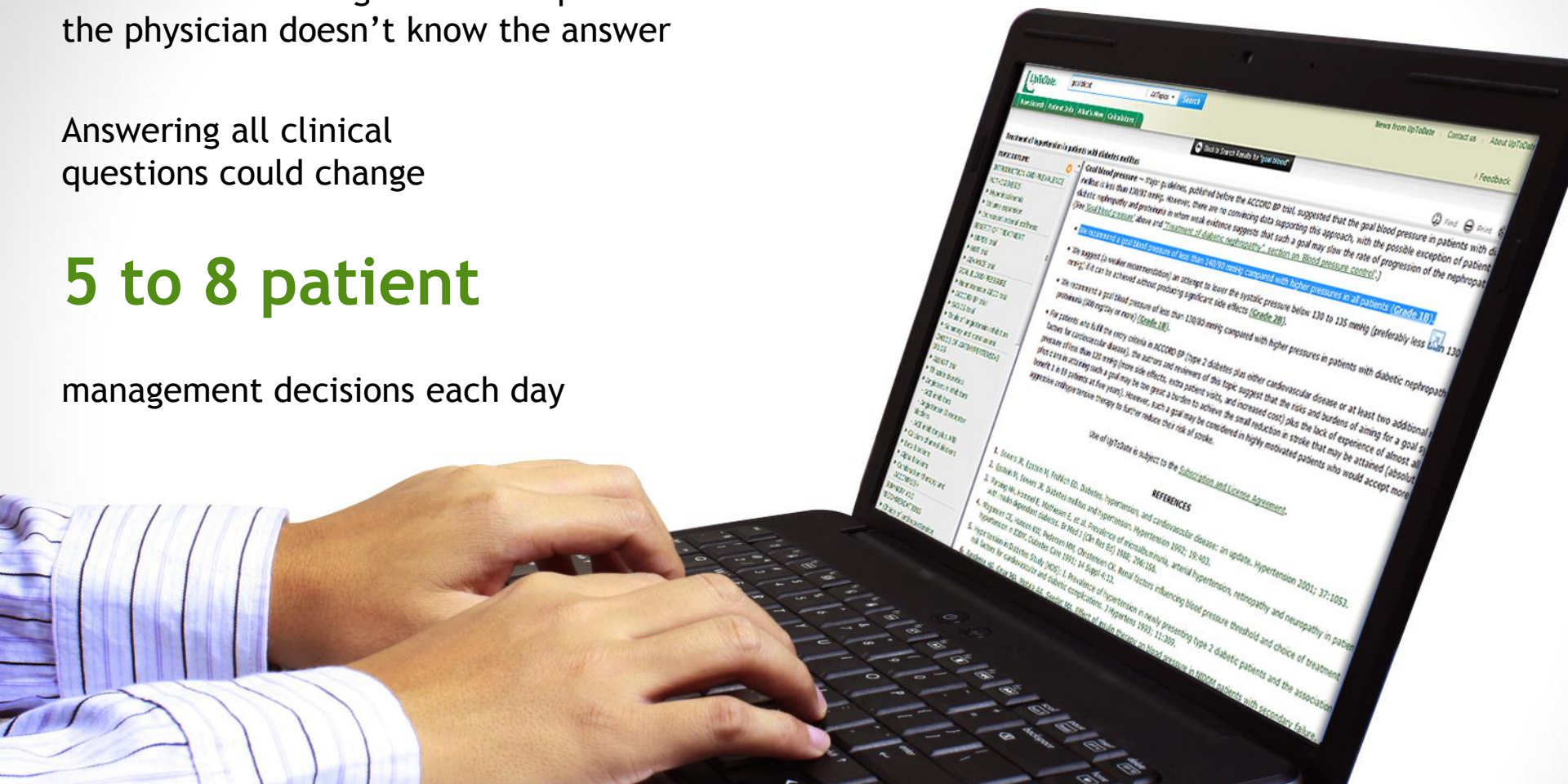
Answering important clinical questions

2 of 3 office visits generates a question to which the physician doesn't know the answer

Answering all clinical questions could change

5 to 8 patient

management decisions each day



Source: Covell, DG. Ann Intern Med 1985; 103:596; Green, ML. AM J Med 2002; 109:218; Osheroff, JA. Ann Intern Med 1991:575; Ely, JW. J Am Med Inform Assoc 2005; 12:217; Gorman, PN. Med Decis Making 1995; 15:113

UpToDate solves this problem

Identify important clinical questions

- 9,500+ topic reviews in 21 clinical specialties
- 5,100 drug entries
- 1,500 patient topics

Recruit a faculty of experts to write Evidence-Based answers to those questions

- 5,100 authors and editors from 50+ countries
- Unique editorial process to ensure we get the answer right

Provide specific recommendations for care

- Impact clinical decision making
- More than 20 million topics viewed each month

UpToDate is a scalable global platform




- 750,000+ clinicians in 158 countries
- 50% of U.S. hospitals and over 4,000 hospitals outside U.S.
- 90% of academic medical centers in the U.S., 95% in Benelux, 95% in Germany, 86% in Japan
- Subscription based; double-digit growth for 20 years
- Available on multiple platforms
 - Web, desktop, mobile
- Integrated into the Electronic Health Record (EHR)


Business model




Customers

- 
- Individual clinicians
 - Hospitals
 - Hospital systems

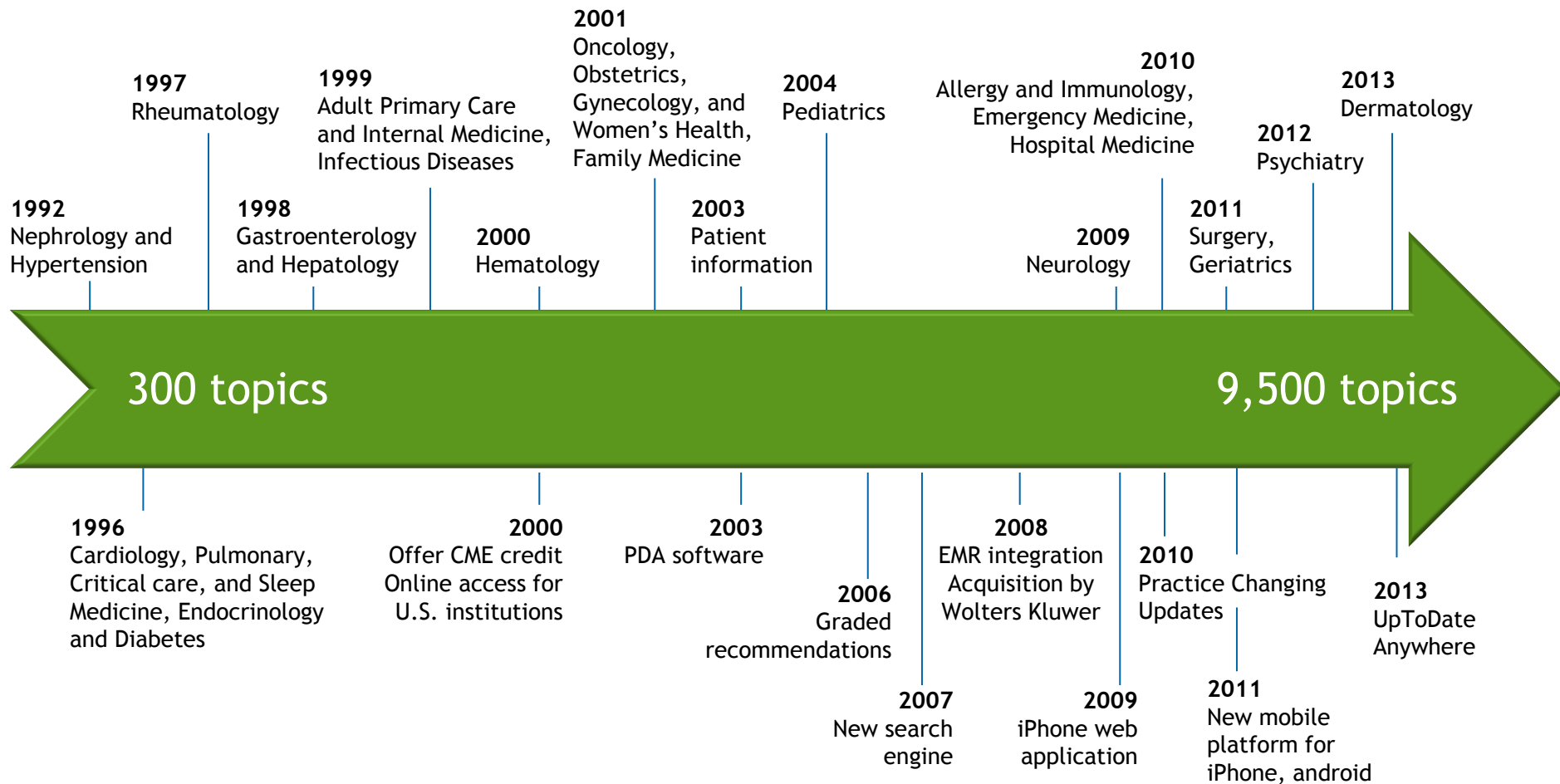
Revenue

- 
- Subscriptions
- One year - Multiyear

Growth

- 
- New specialties
 - Drive penetration globally
 - Broader access for existing customers (UpToDate Anywhere)
 - New products (mobile)

UpToDate evolution



Mobile devices have expanded use and provided an additional source of revenue



116,427 users on
172,281 iOS devices



22,635 users on
27,031 Android devices

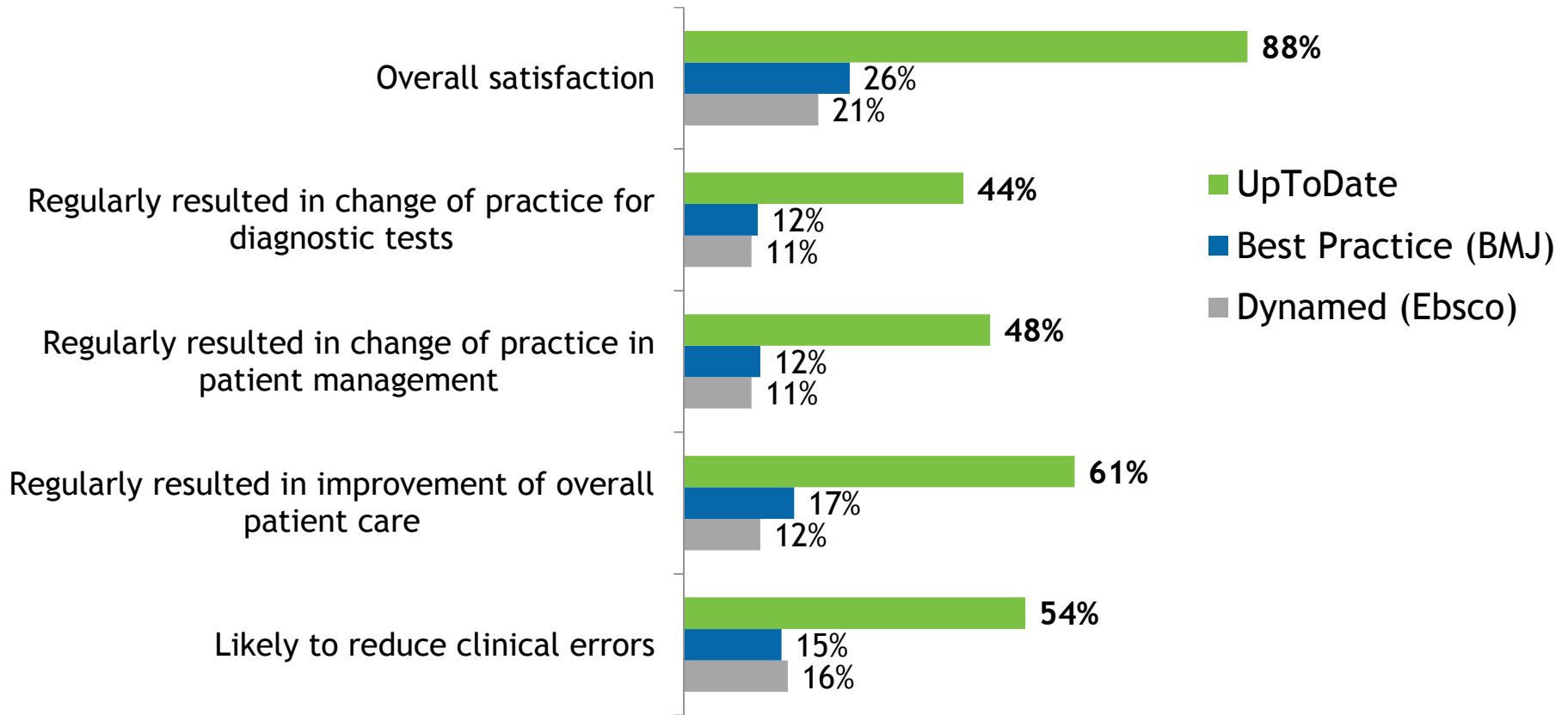


Use on Windows 8 tablets and phones is low but growing



UpToDate video

UpToDate is the preferred clinical resource



“UpToDate is by miles the better resource. It would be a waste of money getting another resource over UpToDate”

Source: Data from trial at the Pennine Acute Hospitals NHS Trust in the United Kingdom

And UpToDate is the most frequently studied

Over 30
research studies

What we have learned:

- Allow more questions to be answered faster
- Most commonly used resource
- Most effective training resource
- Greater confidence than other resources
- Change decisions
- Improve outcomes



UpToDate changes clinical decision making



“Use of UpToDate led to changes in investigations, diagnosis or management 37% of the time”

Original Article

Singapore Med J 2012; 53(2) : 116

Utility of the electronic information resource UpToDate for clinical decision-making at bedside rounds

Phua J¹, MBBS, MRCP, See KC², MBBS, MRCP, Khalizah HJ¹, MBChB Manc, MRCP, Low SP¹, MBBS, MRCP, Lim TK¹, MBBS, FRCPE

And changing decisions improves outcomes

From researchers at Harvard school of Public Health

Adoption of UpToDate Associated with:

- Improved Quality
Every condition on Hospital Quality Alliance Metrics
- Shorter Lengths of Stay
372,000 days over 1 year
- Lower Mortality Rates
11,500 lives over 3 years

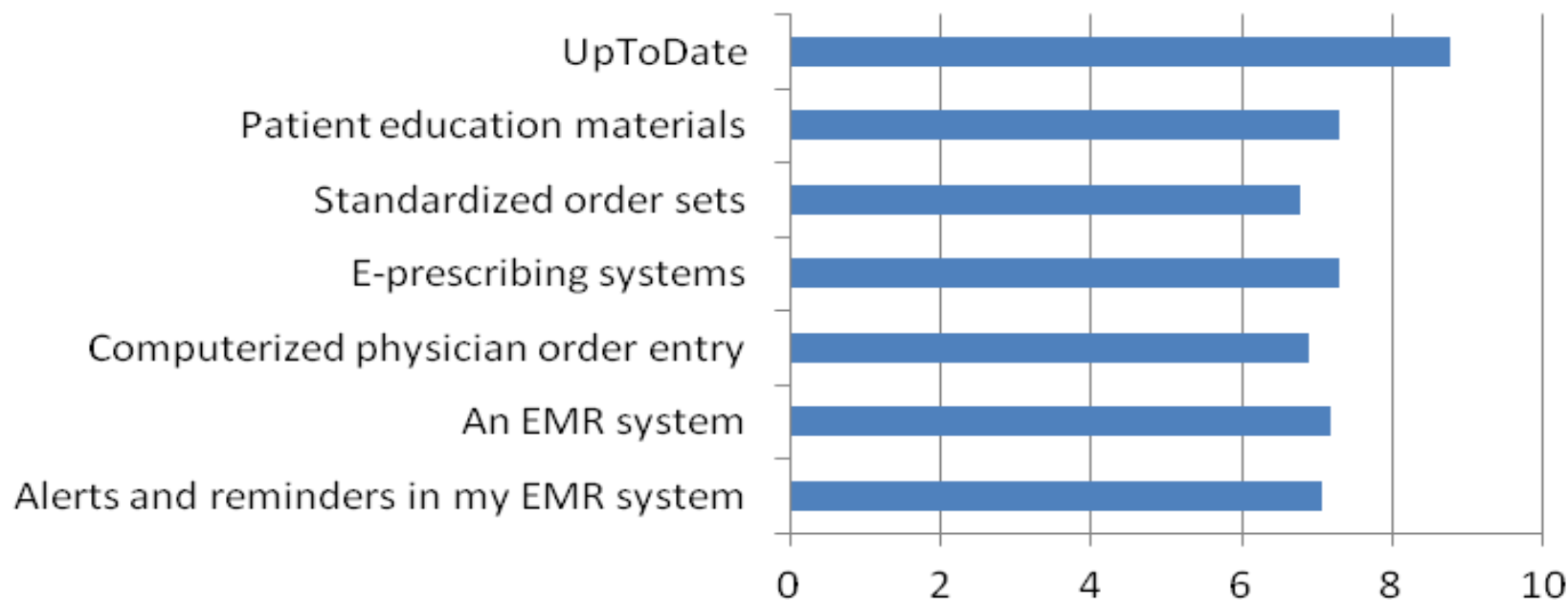


Source: Isaac T, Zheng J, Jha A. Use of UpToDate and outcomes in U.S. hospitals. J Hosp Med 2012; 7:85

Users consider UpToDate the most valuable HIT initiative for improving patient care

Which of the following IT initiatives produce the greatest benefit to the quality and safety of patient care?

Scale of 1-10, 10 being most important; n=14,284



Source: 2012 Individual Subscriber Survey

UpToDate - Summary

UpToDate is solving an important problem by helping clinicians answer clinical questions at the point-of-care

UpToDate is the preferred clinical information resource due to its unique editorial process and focus on actionable recommendations

Use of UpToDate impacts clinical decision making, which in turn leads to better and more efficient patient care

UpToDate is a scalable global platform that has grown at double-digits for 20 years

Agenda



Sean Benson
VP Innovation



Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A

Demo ProVation MD

■ ProVation MD

- Software replaces dictation/transcription and completed immediately post-procedure by physician: WHEN YOU'RE DONE...YOU'RE DONE
- Fully interfaced with clinical/financial systems to exchange patient, scheduling, procedural and billing information
- Intuitive user interface delivers relevant content to physician, highlights most common choice and automatically navigates through each section of note
- Billing codes automatically generated for optimized reimbursement
- Medical images embedded in note to enhance documentation
- All relevant documents automatically generated



ProVation MD demo

Demo Sepsis Application

■ Sepsis

- Time to treatment is critical, requires mobile solution with continuous patient surveillance
- Patient data analyzed against hundreds of clinical scenarios to determine when mobile alerts should be sent to physician and/or nurse
- Alerts deliver evidence-based, actionable clinical knowledge to mobile devices
- Enables instant communication between caregivers to ensure coordinated care
- Usage tracked to support quality initiatives



Sepsis demo

Agenda

Q&A

Introduction

Overview of Health Division

Professional & Education

Medical Research

Break

Clinical Solutions

Clinical Solutions: UpToDate

Clinical Solutions Demo

Q&A





Wolters Kluwer Health



Thank you.



Wolters Kluwer
When you have to be right