OM1 Platform

Roadmap Planning 2025

Jan 2025

Strategy translates Mission/ Vision into a well-defined Roadmap

Mission

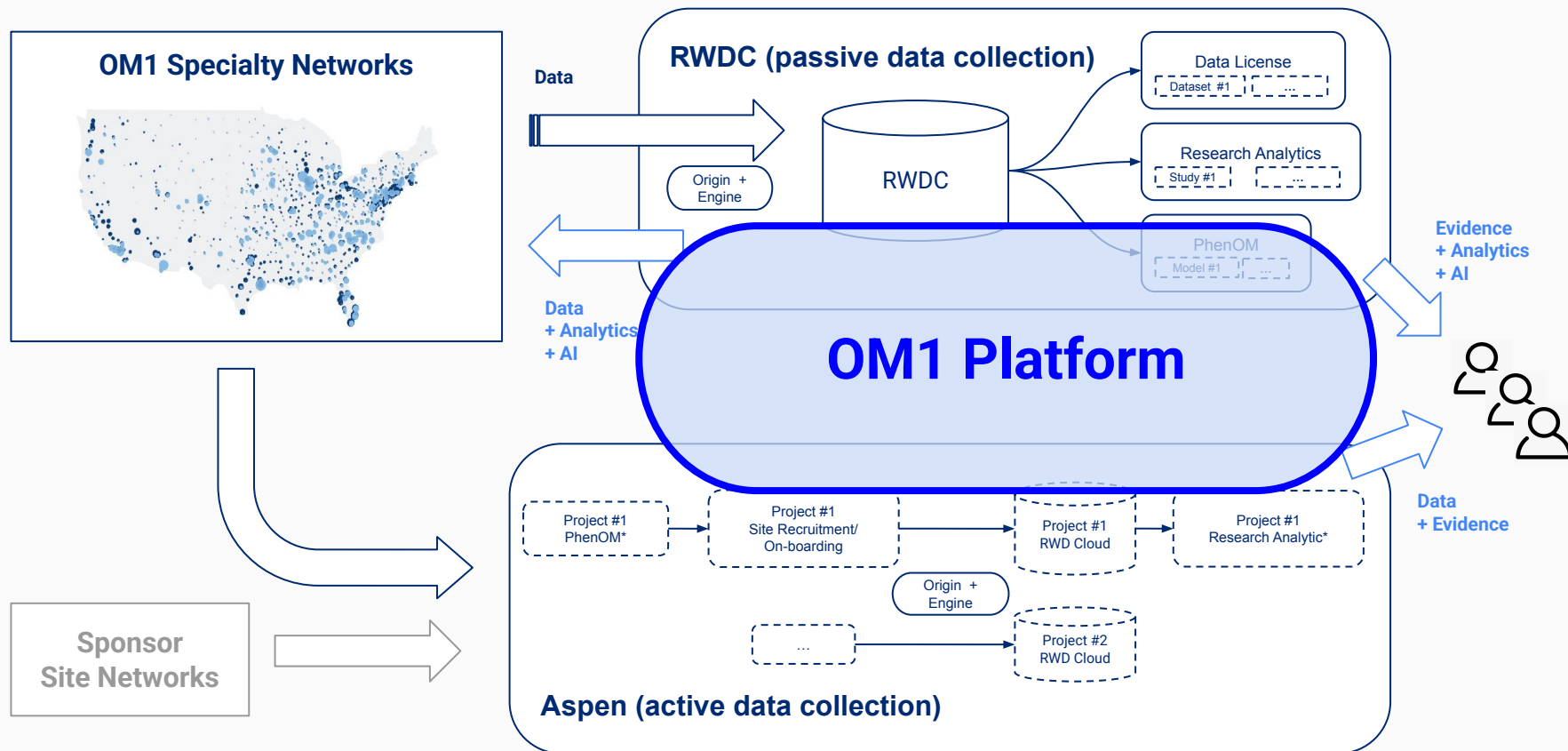*Rapidly improve real world patient outcomes using real world data/ evidence + AI*

Vision

From RWD to RWE + AI in minutes instead of months

Strategy

??

Context #1: Platform = Centerpiece of Value Delivery

OM1 Specialty Networks

Data

RWDC (passive data collection)

Data License
Dataset #1 | ...

Origin + Engine

RWDC

Research Analytics
Study #1 | ...

PhenOM
Model #1 | ...

Data + Analytics + AI

Evidence + Analytics + AI

OM1 Platform

Sponsor Site Networks

Project #1 PhenOM* → Project #1 Site Recruitment/On-boarding → Project #1 RWD Cloud → Project #1 Research Analytic*

Origin + Engine

... → Project #2 RWD Cloud

Aspen (active data collection)

Data + Evidence

Context #2: Platform Currently Delivers Most Value at "Consideration" Stage

Customer Journey

	Pre-Platform			Post-Platform			
	Value Delivery UX	**Target Customers**	**Drawbacks**	**Value Delivery UX**	**Target Customers**	**Benefits**	**Value Delivered YTD ($)***
Consideration	Email, spreadsheets, slidedecks	All	Lots of requests Slow with lots of back and forth	Cohort Explorer	Data License, Research Analytics	Fast, custom counts Can test criteria interactively Can generate counts without sales request	$XXX,XXX cost saving (or $XXXk per quarter) *Up from $XXk per quarter last year*
Conversion	SOW doc	All					$XXX,XXX revenue supported *Up from $XXXk last year*
Delivery	CSV (data), Report doc (evidence, analytics), Support docs	All	Slow data delivery Deals with Channel Partners not possible	Dataset Delivery, Data Studio	Channel Partners, Data Partners	Fast data delivery b/c dataset is already defined in CE Can redelivery based on specific needs	$XX,XXX cost saving *Up from $XX last year*
					[Link to cost/ value estimate spreadsheet](#)		**$XXX,XXX+ total**

Why is this important?

Our products/ services often need to be customized so that "consideration" very often means a non-trivial feasibility analysis

**We should think about our Platform as a way
to streamline consideration, feasibility and delivery**

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Value creati...
activity

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activity

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($)*

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*Value delivery estimate spreadsheet

Context #3: How the Platform Can Drive Growth and Efficiency Downstream

Growth Opportunities

Action	Goal	Outcome
Push Platform access to more users/ possible customers	100% clients who ask for a sales count get access to the Platform	Increase # of possible deals to drive revenue potential
Build support for Aspen consideration (ie Site ID)	Aspen site feasibility done via the Platform	Increase # of possible deals to drive revenue potential
Add other applications that allow us to scale consideration stage for other OM1 products/ services	Build and launch "PhenOM Engine" application	Increase # of possible deals to drive revenue potential
Add new analytics capabilities and applications to the Platform (harder b/c these are unproven markets)	Generate $XXk revenue from paid access to applications on the Platform	Increase revenue by adding a new revenue stream
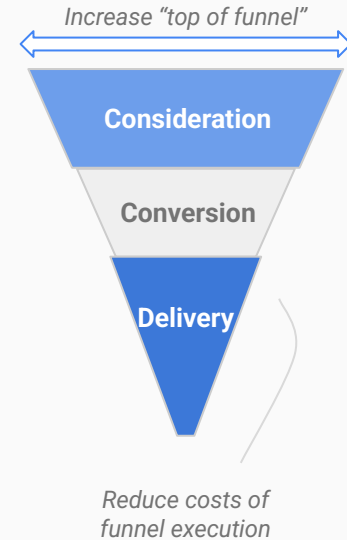
Efficiency Opportunities

Action	Goal	Outcome
Push Platform usage internally	100% sales counts done on the Platform	Reduce costs of consideration and conversion
Add capability for more complex counts and/ or study feasibilities	Rapid Insights and Research Analytic feasibilities done on Platform	Reduce costs of consideration
Automate dataset delivery	100% dataset deliveries done by the Platform	Reduce costs of delivery

Increase "top of funnel"

Consideration

Conversion

Delivery

Reduce costs of funnel execution

Growth Opportunities

Action
Push Pla...
Build su...
Add oth... stage fo...
Add new... Platform...

Effici...

Action
Push Pla...
Add cap... feasibilies
Automate dataset delivery

	done on Platform	
	100% dataset deliveries done by the Platform	Reduce costs of delivery

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execution

Why is this important?

The Platform can both drive growth and reduce costs because
(a) software is low cost, and
(b) software can be scaled more easily to drive growth

For (b), we should think about growing the Platform using a funnel like:

Acquisition > Activation > Retention > Monetization

Large language models (LLMs) are a new technology that creates a massive opportunity for businesses to transform how they create and deliver value

In particular, LLMs are well-suited to "intelligently" automating processes/ tasks and dramatically reducing time/ costs of value delivery
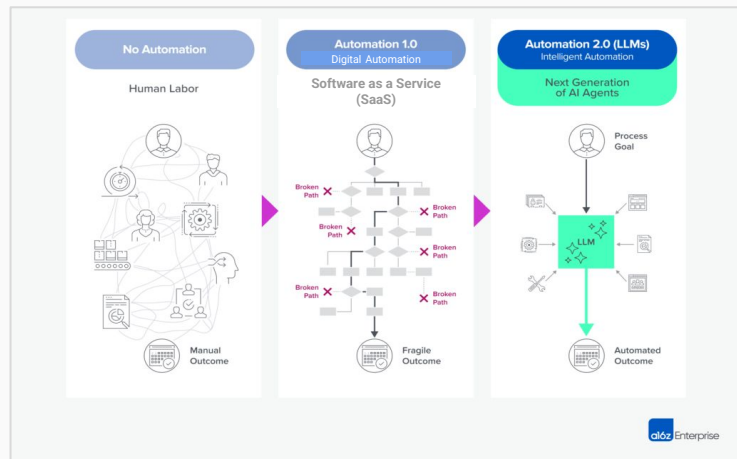
Source
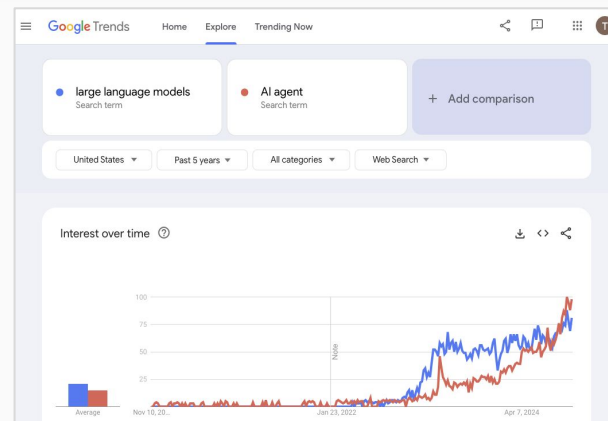
Source

Not just hype, we know one of our customers is using Atropos

Strategy: "Intelligent Automation" for RWD/ RWE + AI

1. Streamline Feasibility/ Consideration and Value Delivery

Continue to invest in automating high-cost or slow activities from "feasibility to value delivery" in order to reduce costs and add value (e.g. speed, customization, etc). This is about making it easy to define assets (e.g. datasets) customized to user needs and make it as fast/ simple as possible generate value from those assets (e.g. generate RWE).

2. Drive More Revenue by Expanding Our Consideration Experience

Continue to invest in improving our consideration experience. We've already invested in Cohort Explorer to support consideration for our data products, but we can expand applications to support consideration of our other solutions. We should also prioritize applications with higher revenue potential and market demand, because those will have higher ROI.
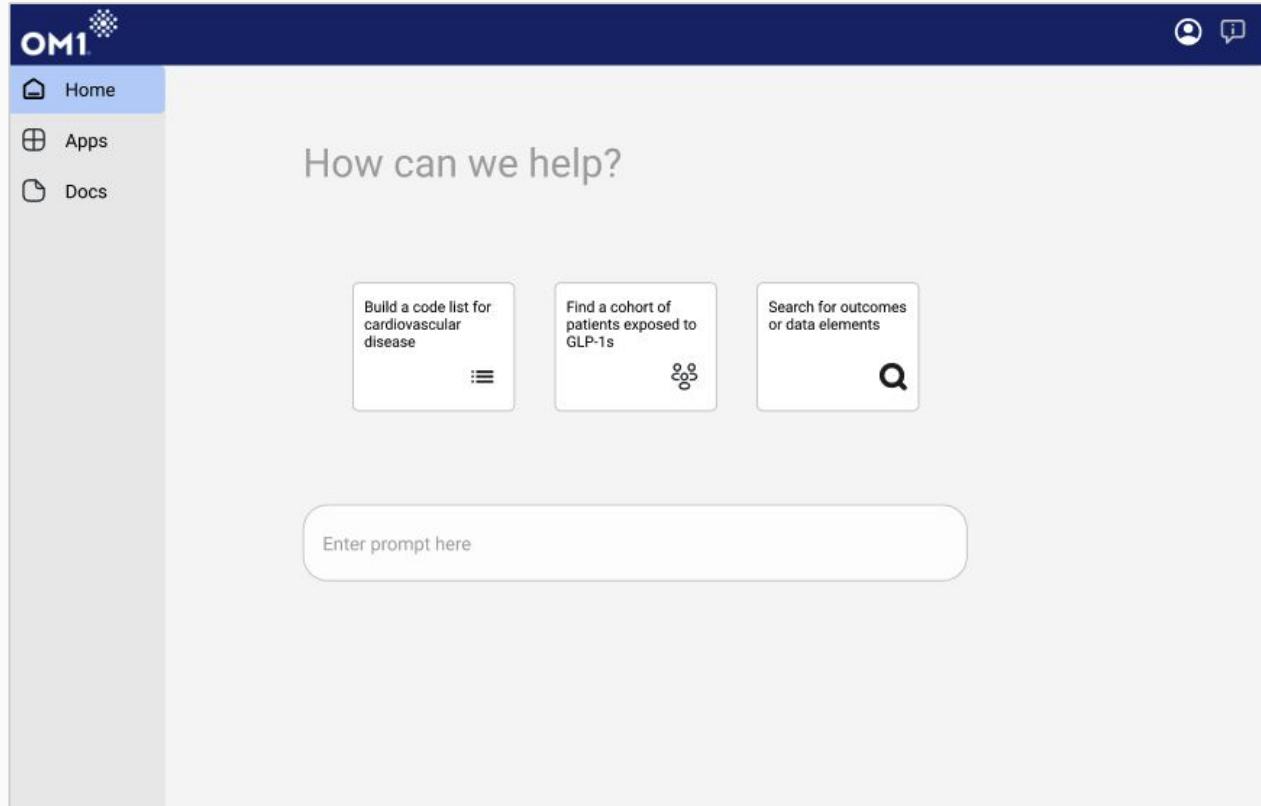
3. Intelligent Automation

LLMs/ AI agents have created a massive opportunity to transform how we produce and deliver value. We should try to leverage it as much as possible to accomplish #1 and #2.

The solution

An intelligent automation platform for end-to-end RWD/ RWE and AI

Solution Design: AI Agent Layer

AI centric/ native layer

Users can get started easily with example prompts

The LLM agent can access APIs and docs to coordinate what the user needs

APIs are the same as the the digital apps, so users can also access "point and click" UI/ UX if they prefer

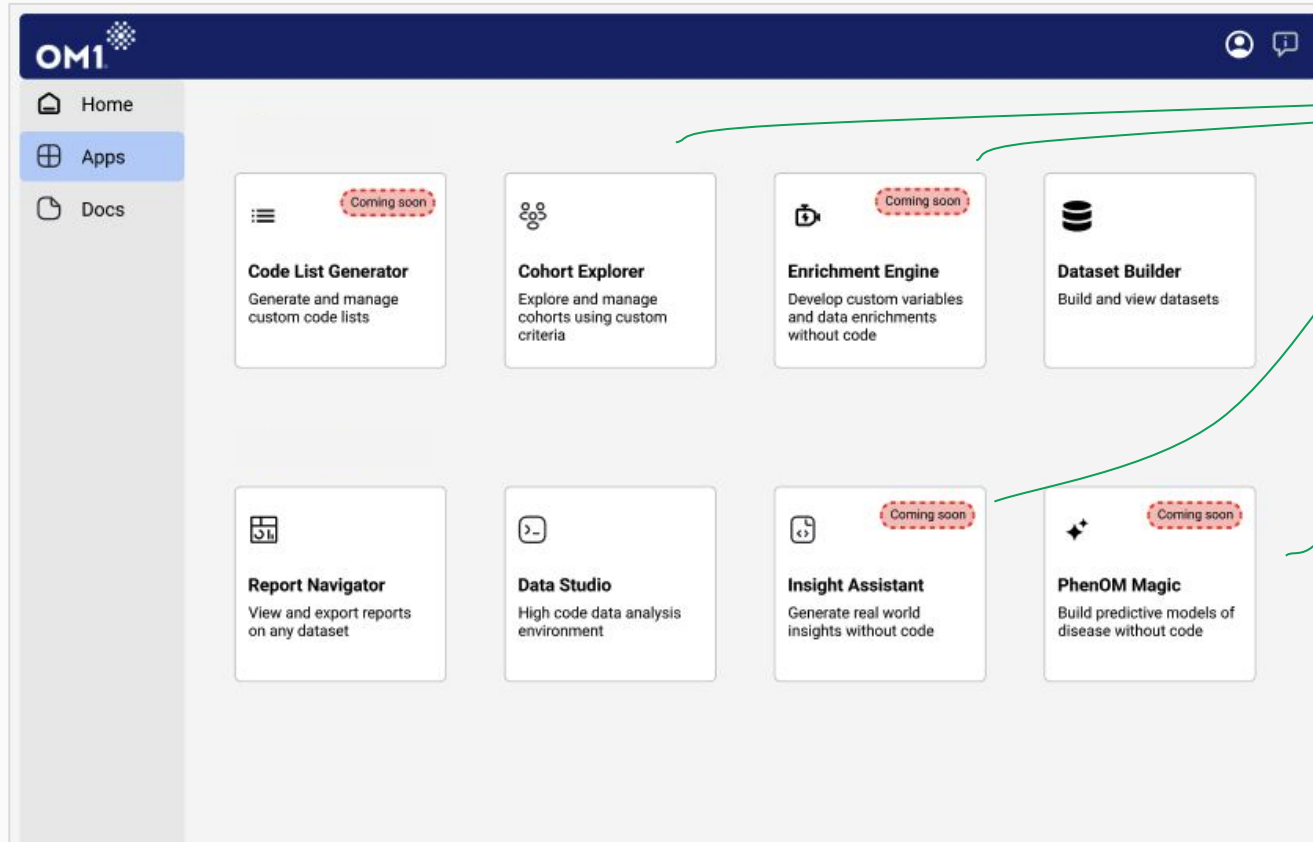A user might ask to define and create a cohort and the AI agent would
- Create a code list
- Build a cohort

But then the user can to the Code List app and make small adjustment manually

.. or adjust the cohort

.. Or view results in a more of a dashboard/ app like interface (rather than in chat)

Solution Design: Application Layer

OM1

- Home
- Apps
- Docs

Code List Generator — Coming soon
Generate and manage custom code lists

Cohort Explorer
Explore and manage cohorts using custom criteria

Enrichment Engine — Coming soon
Develop custom variables and data enrichments without code

Dataset Builder
Build and view datasets

Report Navigator
View and export reports on any dataset

Data Studio
High code data analysis environment

Insight Assistant — Coming soon
Generate real world insights without code

PhenOM Magic — Coming soon
Build predictive models of disease without code

Growth driver

Digital apps (supported by APIs) still the backbone of the Platform

Users can use apps as normal via UI/ UX if they choose to

2025 Roadmap

Q1

AI assisted cohort building

Fast, streamlined cohort to dataset workflow

Apps home page redesign

Q3*

PhenOM Builder

Monetization/ billing

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec

Q2*

Enrichment Engine

Code List Generator

Integrate documentation, knowledge base and search

Q4*

Insight Assistant

Unified AI agent UI

*Tentative, pending market/ customer feedback

Monetization (usage-based option)

Pricing model
- Usage-based
- Also tiered

Allow users free access

Give users "credits" (similar to other GenAI tools) where they can only generate outputs if they have enough credits

Features that require credits:
- Cohort creation
- AI agent analysis
- PhenOM model creation
- etc

Free

$0 *per month per user*

Small # of free credits

Professional

$50 *per month per user*

Moderate # of credits

Enterprise

Contact Sales

Unlimited credits
Dedicated support