

October 28, 2021

Dear Sourcewell Team,

Below are a series of curated links that, when clicked, will take you to published video content that may be helpful in your evaluation. Along with the link is a brief description of what the video content contains. We sincerely hope you view these videos to get a sense of the care we deliver and the culture of our team.

Our mission is to free 2B people from physical pain. We do this by improving access to clinical-grade musculoskeletal care with our virtual care model. Being awarded a contract through Sourcewell will take us one step closer to achieving this goal. Thank you for taking the time to publish this RFP and considering SWORD Health.

Sincerely,
Ross Reavis

A handwritten signature in black ink that reads "Ross Reavis".

Regional Vice President, Sales
ross@swordhealth.com

Links to helpful video content

SWORD Health - Program Overview & How it Works

In this video, you will learn what the SWORD Health program is and how it works.

[Click here](#) to view this video.

Length: 00:01:49

SWORD Health Demo - Member-facing

In this video, you see what a SWORD session looks and feels like for someone participating in the program. You learn how we use our FDA-listed wearable sensors to capture data for the Physical Therapist and how we surface real-time information to the participant to correct their form during a session.

[Click here](#) to view this video.

Length: 00:04:51

SWORD Health Demo - Physical Therapist Portal

In this video, you will see what a SWORD Physical Therapist sees. This is a view into their portal where they manage their member caseload daily. This portal allows them to track member performance, exercise compliance, augment care plans, communicate with members, and log documentation.

[Click here](#) to view this video.

Length: 00:05:00

How SWORD Health uses computer-vision technology in its sessions

In these two videos, you will see how computer-vision technology (CVT) is used for certain exercises in the SWORD program. CVT is used to track fine motor movements and especially useful when treating carpal tunnel syndrome, hand and wrist conditions, and more.

[Click here](#) to view video #1.

Length: 00:00:39

[Click here](#) to view video #2.

Length: 00:00:32

Member Testimonial - Ric's Story

In this video, you will hear from a SWORD member, Ric, and hear the story of his journey to recovery.

[Click here](#) to view this video.

Length: 00:02:21

Member Testimonial - Mischa's Story

In this video, you will meet Mischa, a nurse who had chronic knee pain for years and was heading down a surgical pathway before joining SWORD.

[Click here](#) to view this video.

Length: 00:02:02

Member Testimonial - Andre's Story

In this video, you will meet Andre, a general contractor who now calls SWORD "his best friend".

[Click here](#) to view this video.

Length: 00:01:59

Member Testimonial - Jeff's Story

In this video, you will hear from Jeff. Jeff injured his shoulder and consulted an orthopedic surgeon who told him he required surgery and 12-months of rehab to follow. Jeff avoided that surgery and is now stronger than ever, with the help of SWORD.

[Click here](#) to view this video.

Length: 00:02:05

What have you learned as a Physical Therapist at SWORD Health?

In this video, you will meet some of our Physical Therapists and hear what they love most about what they do here at SWORD.

[Click here](#) to view this video.

Length: 00:01:33

Sourcewell 

+



SWORD HEALTH

**Let's
outsmart MSK,
together.**

October 27, 2021

CONFIDENTIAL - DO NOT SHARE OR DISTRIBUTE THIS PRESENTATION



Background



MSK is a major problem for employers

>50%

of Americans suffer
from MSK pain


>\$200B

in healthcare costs
annually in the US

#1

issue impacting
healthcare spend

**MSK is costing us more than
cancer and mental health combined**



Physical therapy
works... **but it hasn't
changed in
60 years**



>70% PT dropout rate after just 4 sessions. Why?

Access

Geography and provider shortages limit options

Cost

Copays & pricing opacity deters adherence

Priorities

Working adults struggle to take time off work

Most healthcare providers agree, if we just adhere to PT we could save >50% of today's costs

The background is a solid dark blue color. It features several large, light blue, abstract shapes that resemble rounded rectangles or elongated ovals, some of which are partially cut off by the edges of the frame. These shapes are arranged in a way that creates a sense of depth and movement, with some appearing to overlap others.

Introducing SWORD Health



SWORD Health

**Clinical-grade MSK
Care made virtual**





SWORD Health Programs



Prevention

Avoid and prevent MSK conditions with premium, original content curated by clinical experts.

Accessed via your personal device

Free for all clients



Virtual Therapy

Help members address acute, chronic, and pre/post surgical MSK conditions with 1:1 virtual care from a doctor of physical therapy and our FDA-listed technology

Engagement-based Pricing

Virtual Therapy Overview

A Doctor of Physical Therapy with you every step of the way



Why it matters

- 1 Assess the member via video call, getting to the root cause faster
- 2 Tap into their clinical expertise to design an effective care plan
- 3 Provide remote monitoring and care plan augmentation when needed

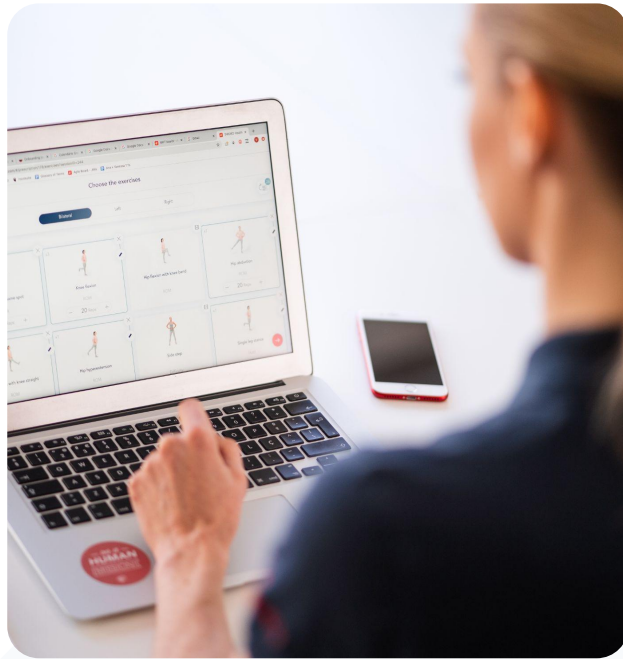
FDA-listed technology collects high-quality movement data



Why it matters

- 1 Detects and corrects movement errors in real-time
- 2 Allows the member to do their sessions at anytime, day or night
- 3 Collects performance and adherence data the PT can rely on

Data-driven decisions result in unparalleled clinical outcomes

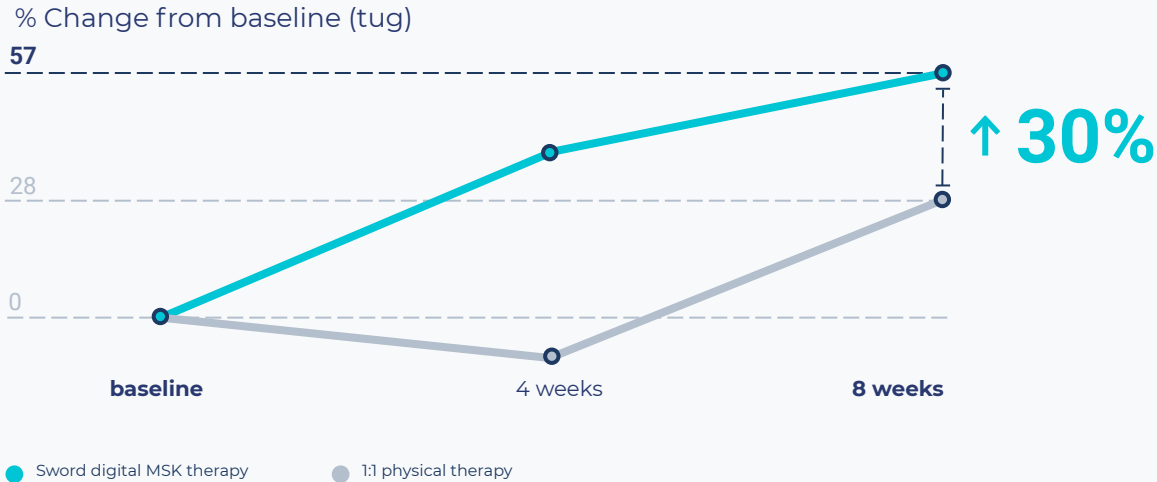


Why it matters

- 1 Member and sensor feedback is reviewed by the PT after each session
- 2 The PT uses high-quality data to augment the member's plan
- 3 Members remain engaged and progress at a safe and comfortable pace



Proven in clinical trials to outperform traditional in-person physical therapy

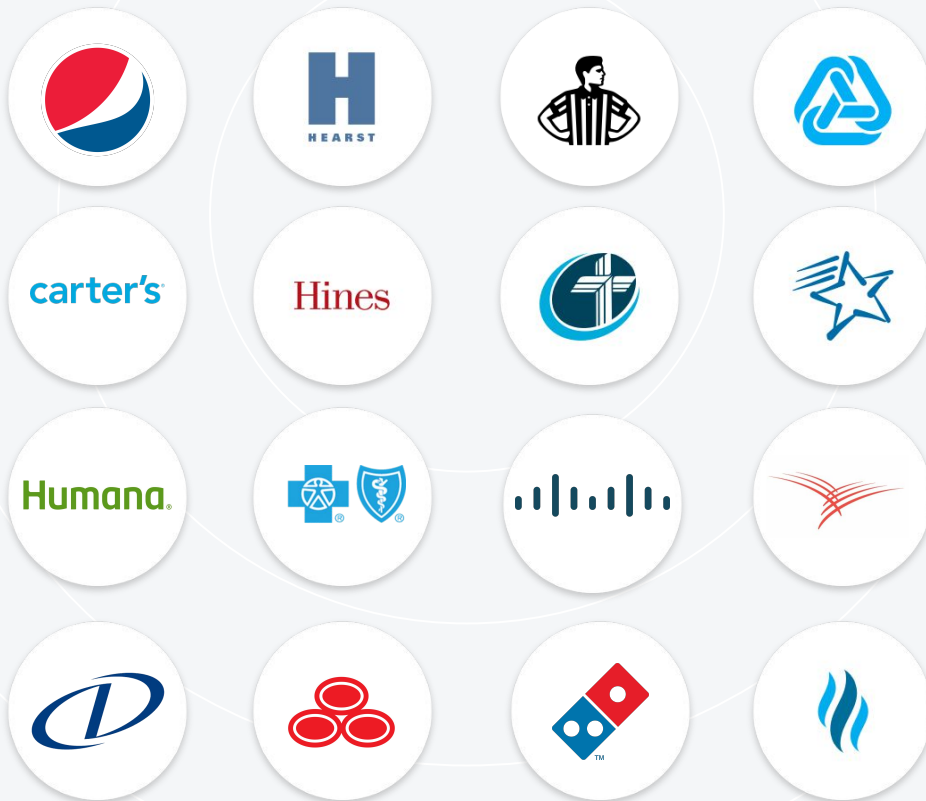


SOURCE: Home-based Rehabilitation With A Novel Digital Biofeedback System versus Conventional In-person Rehabilitation after Total Knee Replacement: a feasibility study, Nature; Digital Versus Conventional Rehabilitation After Total Hip Arthroplasty: A Single-Center, Parallel-Group Pilot Study, JMIR

Trusted by leading employers to deliver quality care

+150 Customers

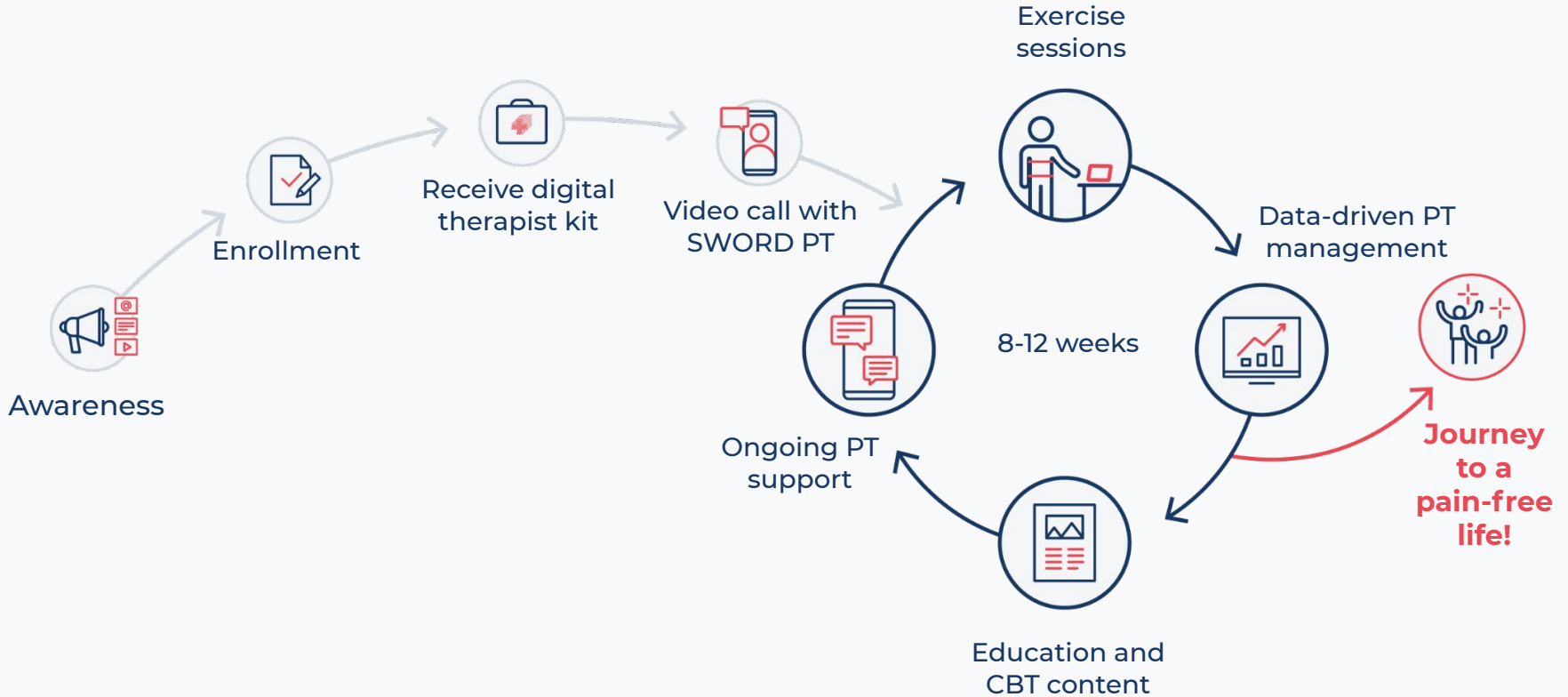
- ✓ Clinical focus
- ✓ Member experience
- ✓ Validated outcomes & savings



The background is a solid dark blue color. It features several large, light blue, abstract shapes that resemble rounded rectangles or ovals, some of which are tilted. These shapes are positioned in the corners and along the sides, creating a modern, geometric aesthetic.

Member Experience

Member journey



The background is a solid dark blue color. It features several large, light blue, abstract shapes that resemble rounded rectangles or ovals, some of which are partially cut off by the edges of the frame. These shapes are arranged in a way that creates a sense of depth and movement, with some appearing to overlap others.

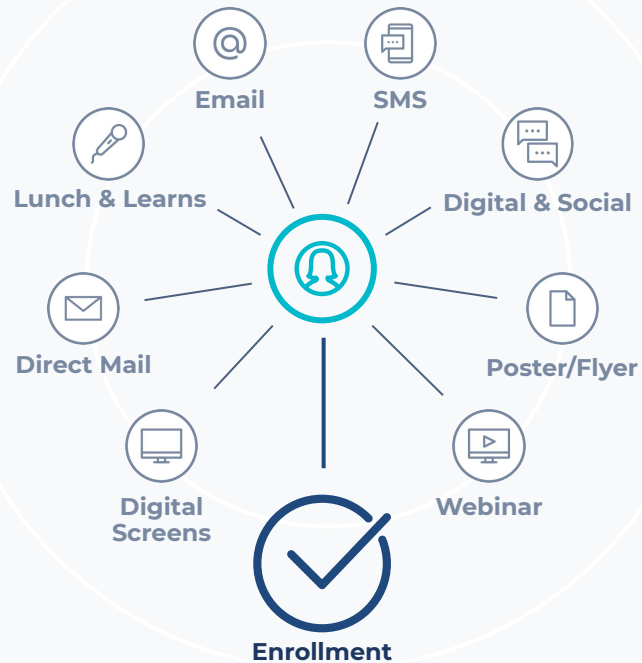
Enrollment Marketing Support

Targeting & enrolling members in need

Average enrollment rate is 5%-9% of the total eligible population

SWORD does all the work

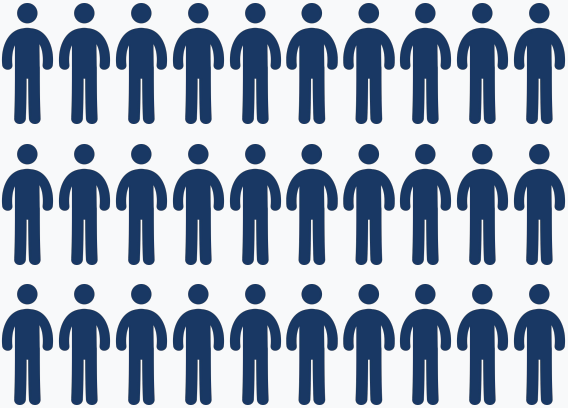
- ✓ Strategize a Plan
- ✓ Design Campaigns
- ✓ Collaborate & Deploy
- ✓ Measure Results





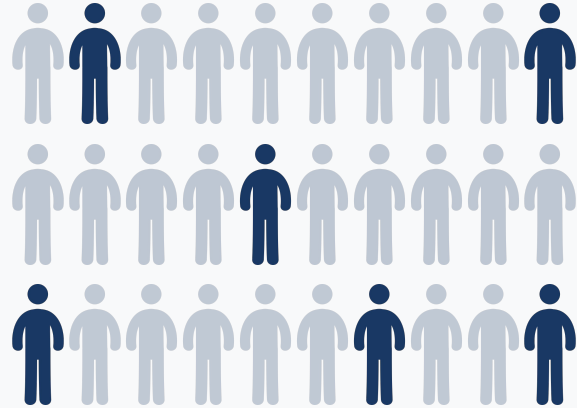
Enrollment marketing approaches

Broad



Intranet, Mailers, Digital Ads, Emails, Posters, Etc.

Targeted



Claims data, job function, demographic, etc.

Enrollment marketing access increases adoption



9% Engagement

- ✓ **Optimal Channels**
Emails, mailers, digital ads
- ✓ **Frequent Promotion**
4x emails in first 3 months
- ✓ **Full Integration**
Deep integration in care pathway

6% Engagement

- ✓ **Standard Channels**
Emails, mailers
- ✓ **Some Promotion**
2x emails in first 3 months
- ✓ **Some Integration**
ie - open enrollment guide, new hires

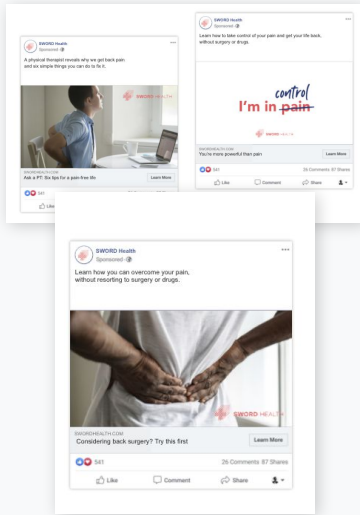
3% Engagement

- ✓ **Limited Channels**
Mailers
- ✓ **Limited Promotion**
1x emails in first 3 months
- ✓ **Limited Integration**
ie - Intranet

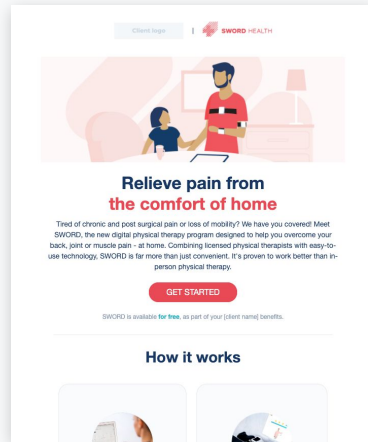
Sample enrollment marketing tools



Digital



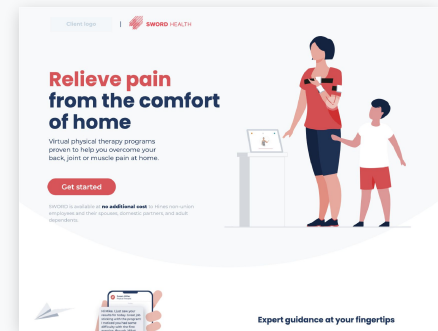
SWORD Email



SWORD Print



Landing page

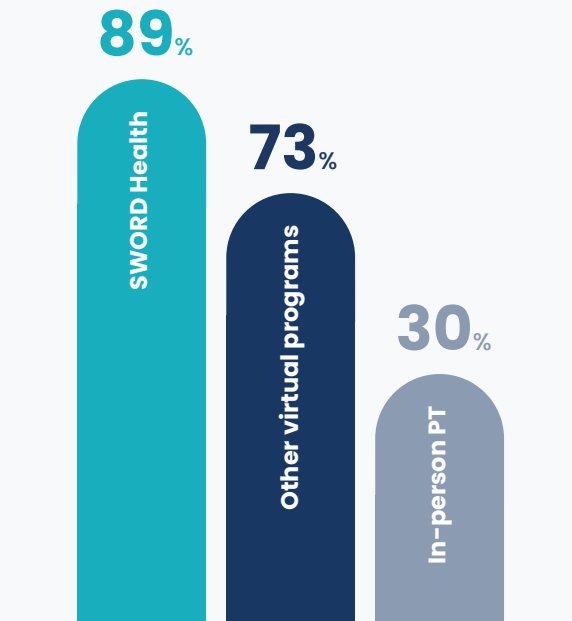


Outcomes

Proven to be the most engaging solution



3 sessions/week for
12-weeks



Adherence rate



Member
Satisfaction





Highest Retention in the virtual MSK space

	Acute	Chronic	Post-surgery
Average Sessions per Week	2.6	3.0	5.7
Retention Rate	87%	89%	98%



SWORD Health is the only virtual MSK program on the market with both **Level 1** and **Level 2** certification from the Validation Institute.

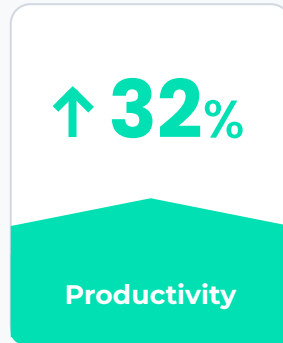
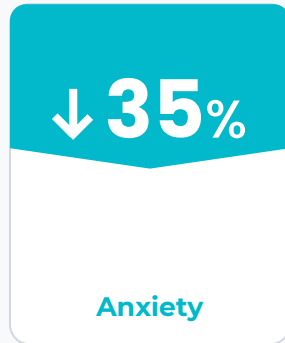
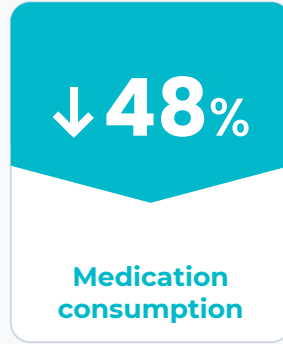
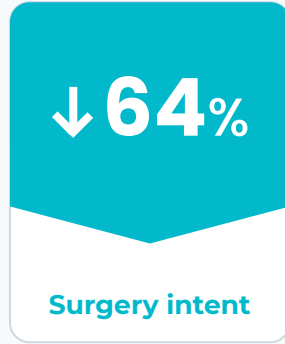


Cost Savings



Outcomes

Proven Outcomes in Physical & Mental Health





\$2,472

per member per year cost savings

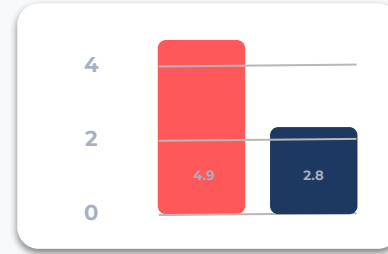


12-week Clinical Outcomes



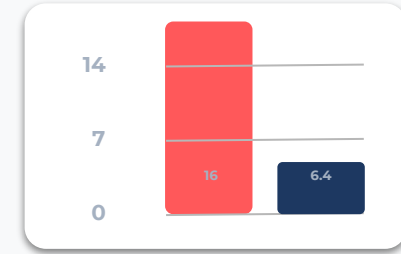
**Fortune 100
Customer**
200k+ members

Pain Reduction



-42%

Surgery Intent



-60%

**Implementation
Score**

10/10

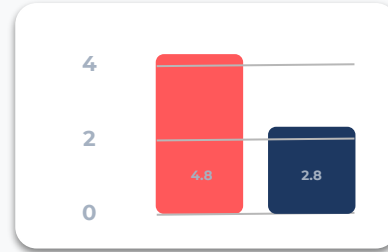
*“This has been one of
the best
implementations I’ve
ever been apart of”*

12-week Clinical Outcomes



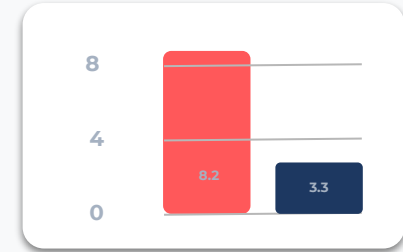
Health Plan
15k+ members

Pain Reduction



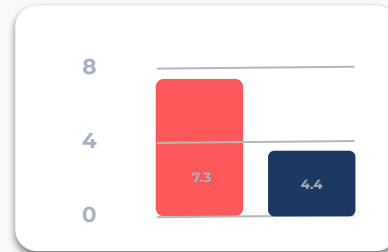
-42%

Surgery Intent



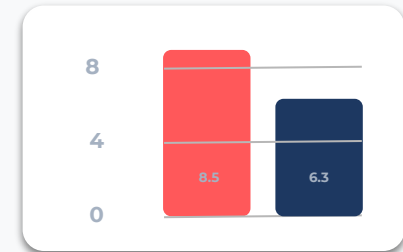
-59%

Anxiety



-40%

Depression



-26%

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Fees & Performance Guarantees

Pricing is fair & transparent



Total Maximum investment

\$950

Per member / year



Enrollment



Payment 1
\$450

3rd Session



Payment 2
\$250

9th Session



Payment 3
\$250

Special pricing proposed to Sourcewell



Performance Guarantees

Our fees are at risk unless we achieve:

1.5x
ROI

100% fees at risk

>40%
Pain Reduction

5% fees at risk

>7.5/10
Member Satisfaction

5% fees at risk

- 1. Measured by self-reported intent for pursuing surgery, from 0 to 100, and translated into ROI according to the following formula: each 1 point decrease in surgery intent corresponds to an estimated 1% savings on cost with surgery.
- 2. Self-reported outcome measured from 0 to 10, referring to the previous week. Assessed for every participant at baseline, and eight weeks thereafter.
- 3. Self-reported outcome of each participant measured from 0 to 10.

**“I thought I was
destined for surgery
and this program has
saved me from that.”**

Jacqueline, neck pain



“What a gift to have first-class physical therapy at home. After 7 weeks, I feel like a new man.”

Arthur, low back pain





**“I’m not taking any medication
at all, I’m sleeping better,
I’m not waking up in pain.
Today I went for an hour
and a half bike ride”**

Pamela, knee pain



Let's outsmart pain, together.

Ross Reavis

ross@swordhealth.com





SWORD HEALTH



Let's
outsmart pain,
together.

Financial and Experience
Outcomes Report

Giving people the power to heal, at home.

You probably know that musculoskeletal (MSK) conditions are a big issue today. 50% of Americans suffer from MSK pain, and it's costing us \$190B a year - more than cancer and mental health combined. What you might not know is that it's possible for these people to recover from that pain at home, without resorting to surgery or painkillers... at a fraction of the cost. High quality traditional physical therapy works wonders for MSK issues, but doesn't fit into our lifestyles.

SWORD Health is the only digital MSK therapy provider that's been proven to outperform traditional physical therapy. Our groundbreaking solution combines licensed physical therapists with medical-grade technology to give you access to an MSK solution that gives you the best of both worlds - helping your people get better, faster, and saving your business millions.



Better for business

Reduce your MSK spend by up to 34% by avoiding unnecessary costs from surgeries and traditional PT



Better for people

Give your people best-in-class care with a personalized, clinically-proven program they can do without leaving home



"On my initial appointment, I had a makeshift 'cane'. Today...I'm cycling 100+ miles a week, and I'm able to do everything without any restrictions. I am forever indebted to the SWORD program."

Dan, chronic low back pain



Better for business

Today, the care pathway for a member with an MSK issue is inefficient, confusing and costly. In the majority of cases, members do not have access to care that actually works. They end up spending thousands of dollars in outpatient appointments, imaging, medications, chiropractors, and traditional physical therapy, and many end up in surgery.

In members who go into surgery, the total cost for a full year of care can range from \$10k (shoulder) to \$64K (low back).

SWORD Health's solution is clinically-proven to reduce the need for surgery by up to 64% and outperform traditional physical therapy by 30%.

How much you'll save

Between 40 to 50% of your employees suffer from MSK conditions, and 20% seek care because of them. Here is what your savings could look like if we enroll between 3 and 7% of your employees. We achieve this by reducing healthcare usage across all types of care, especially surgeries, which are by far the biggest cost driver.



What this means for your business in Year 1



Performance, guaranteed

We put 100% of our fees at risk. If you don't see results, you don't pay. At the end of each year, we will calculate the total surgery and PT avoidance cost, and if it is not greater than the total amount

you paid during the year, we will refund you the difference. We also don't assess any fees for members who don't attend at least 25% of their sessions during the first month of the program.



Better for people

At SWORD Health, we believe that you're not really saving money unless you're making a real impact on people's lives. Our intervention is not only proven to work better than anything else out there, members love it, too.



Net Promoter Score



Member Satisfaction

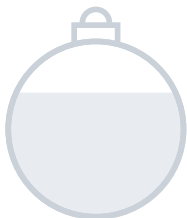


> 3 day Adherence



Before, my pain was so bad that I couldn't sleep. Now... I've completely stopped my medication. It really has changed my life.
Sara, chronic low back pain

Saving time and the planet



71%

of our members did their sessions on Christmas Day last year!



200,000

Commuting miles saved this year by SWORD's program, equivalent to 8 trips around the Earth!



How we calculated these financial outcomes

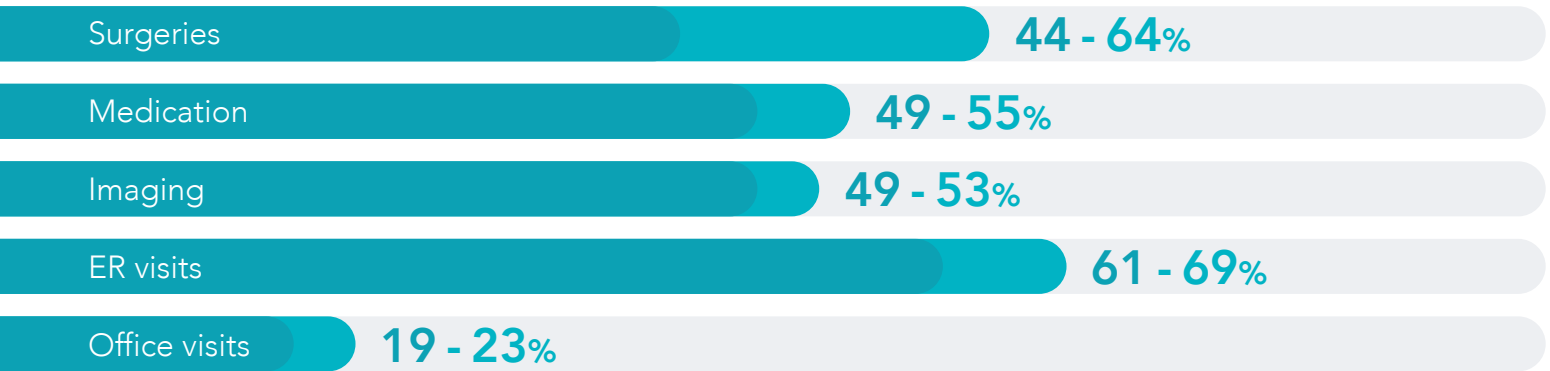
01 We have partnered with Avalon Health Economics to produce a model that would reflect the impact of our programs. This model factored in the holistic nature of our programs, as well as the fact that our program is significantly more engaging than traditional physical therapy. Our retention rates are 89%, much higher than conventional physical therapy, where 50% of participants drop out after just 4 sessions.

02 We analyzed all claims related to MSK conditions from the IBM MarketScan database for 2017, with a sample size of over 2 million patients.

03 We analyzed expenses related to each type of care - inpatient surgery, outpatient surgery, painkillers (including opioids), office visits, imaging, ER visits, and conventional physical therapy - to determine the costs associated with each of them for a typical patient.

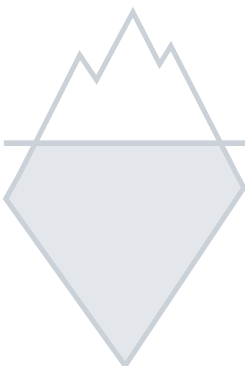
04 We then calculated the impact of SWORD's programs on the usage of each type of care, factoring the cost of the SWORD program into the totals.

According to these calculations, you can expect SWORD's program to reduce the number of claims for each type of care in the following ranges:



What's not included

The SWORD Health program is likely to save your business and your people more than we've shown in our calculations, because we didn't include the indirect costs of MSK on your business.



34%
of missed workdays are MSK-related



1/3
of people prescribed opioids misuse them

Sources: Bone and Joint Initiative, National Institute on Drug Abuse

Let's
outsmart pain,
together.



For a personalized, comprehensive cost savings
analysis for your business, email us today:

hello@swordhealth.com

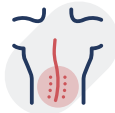
A better way to overcome musculoskeletal pain

Help your members outsmart MSK pain with the only clinical-grade digital solution proven to outperform in-person care.



The only solution that works for everyone

Our clinically-validated programs work for all the major MSK issues, at any point in the journey: prevention, acute conditions, chronic pain and post-surgical recovery.



Lower Back



Shoulder



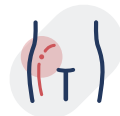
Neck



Knee



Elbow



Hip



Ankle



Wrist

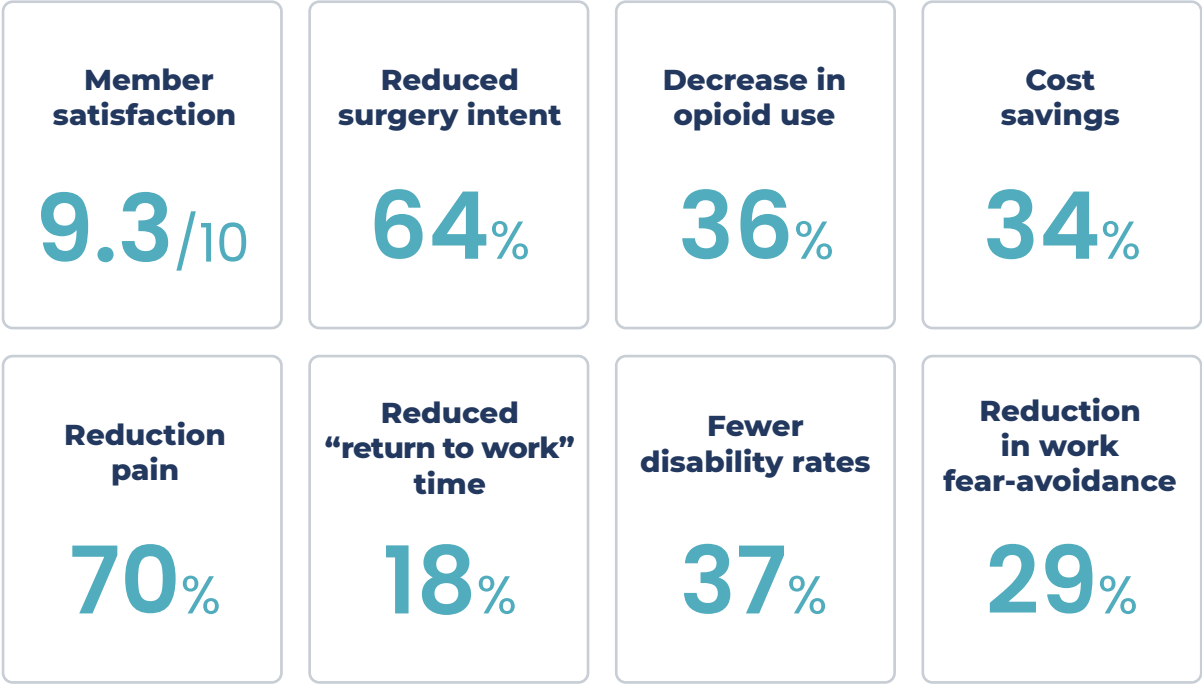
Covering 1.4M lives & growing

Some partners:



Outcomes you can count on

Our programs are proven to work better than anything else out there, and save both members and businesses money by removing the need for surgeries and other costly treatments.



Before, my pain was so bad that I couldn't sleep. Now... I've completely stopped my medication. It really has changed my life.

Dan, chronic back pain

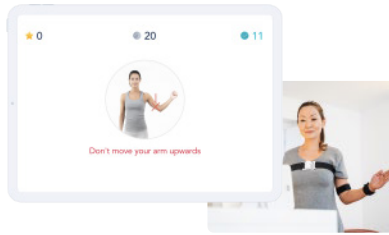


Human care meets superhuman tech



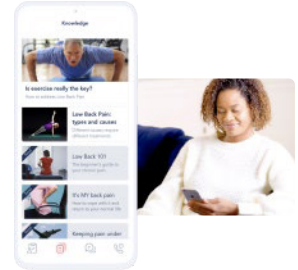
Physical Therapists

We match members with a Doctor of Physical Therapy who identifies their condition, develops a therapeutic exercise program, and educates and coaches them to better health.



Digital Therapist

Our FDA-listed Digital Therapist guides members through an exercise program designed just for them, gives them live feedback, and corrects their form - all supervised virtually by their physical therapist.



Member app

The SWORD Health app helps members make changes that last. Members use the app to chat with their PT, learn about their condition and train their brain with guided behavioral therapy sessions.

Our certifications



HITRUST



Other recognitions



About us



Headquarters

SWORD Health Technologies, Inc.
1633 W Innovation Way 5th Floor
Lehi, UT 84043



Contact info

ask@swordhealth.com

Relieve pain from the comfort of home

Tired of chronic and post surgical pain or loss of mobility? We have you covered! Meet SWORD, the new physical therapy alternative designed to help you overcome your back, joint or muscle pain – at home. Combining real physical therapists with easy-to-use technology, SWORD is far more than just convenient. It's proven to work better than in-person physical therapy.

Coming Soon



How it works

1



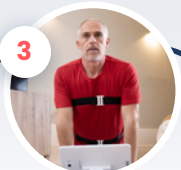
Your dedicated physical therapist designs an exercise program just for you.

SWORD will ship you a tablet and motion sensors to guide you and provide real-time feedback during your exercises.

2



3




Complete your exercise sessions at home when it is convenient for you.

Your physical therapist is there to support you virtually and is available at any time.

4



Wherever it hurts, SWORD can help


- 
Lower Back
- 
Shoulder
- 
Neck
- 
Knee
- 
Elbow
- 
Hip
- 
Ankle
- 
Wrist



SWORD HEALTH



How a top 5 health plan
freed their members
from chronic pain



Before, my pain was so bad that I couldn't sleep. Now... I've completely stopped my medication. It really has changed my life.

Sara, chronic low back pain

THE CHALLENGE

Rising pain and rising costs

Low back pain will affect 80% of us in our lifetime, and is the leading cause of disability worldwide. Physical therapy (PT) has been shown to be as effective as surgery, but the plan's members weren't adhering to their programs, and as a result, claims for elective surgeries, imaging and prescription medications were increasing, costs were soaring, and people just weren't getting better.

THE SOLUTION

Clinical-grade care, at home

The health plan wanted to find a way for their members to access treatment for their pain from home, but didn't want to compromise on quality of care. They chose SWORD Health - the only digital MSK treatment proven to outperform the gold standard of care. SWORD uses licensed physical therapists and FDA-listed technology to give members a way to overcome their pain at home, with a holistic program that combines exercise, behavioral support and education.



THE RESULTS

The best of both worlds

Plan members who've completed the SWORD program are significantly less likely to consider surgery, they're off their meds and they've got their lives back.



Less pain, fewer surgeries, less medication



reduction
in pain



decrease
in surgery intent

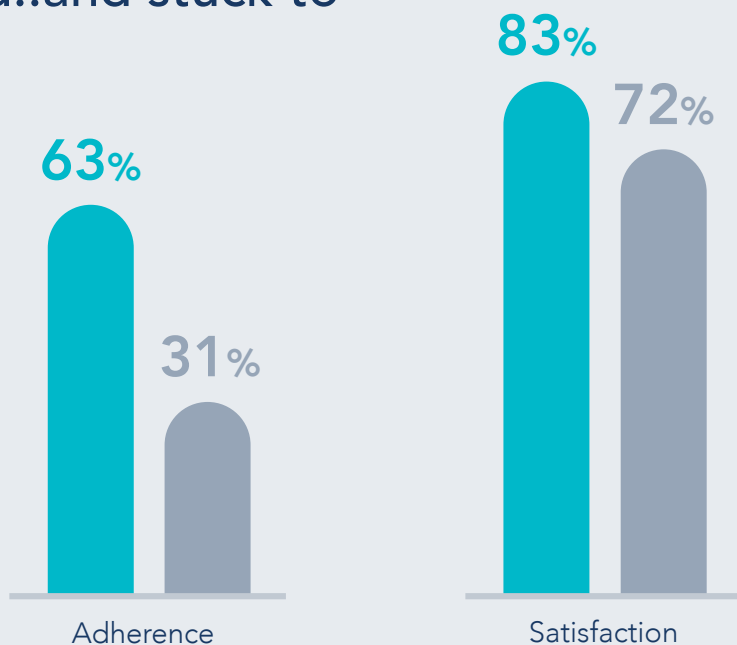


decrease
in pain medication

A program they enjoyed..and stuck to

● SWORD

● Traditional PT





“On my initial appointment, I had a makeshift ‘cane’. Today...I’m cycling 100+ miles a week, and I’m able to do everything without any restrictions. I am forever indebted to the SWORD program.”

Dan, chronic low back pain

ABOUT

SWORD Health

SWORD Health is a digital musculoskeletal (MSK) and pulmonary therapy provider that’s on a mission to free two billion people from chronic and post-surgical pain. The company’s AI-enabled digital therapy platform pairs expert physical therapists with medical-grade wearable

technology to deliver a fully remote, yet highly personalized treatment plan that is more effective, easier and less expensive than traditional physical therapy. SWORD believes in the power of people to recover at home, without resorting to imaging, surgeries or opioids.

Contact Us:
hello@swordhealth.com

STATE OF MSK SURVEY

Navigating the Painsdemc

The impact of COVID-19 on
musculoskeletal conditions in the workforce





About the survey

As COVID-19 hits another peak in the U.S. and around the world, millions of Americans have been working remotely for the better part of a year. Employers are looking for solutions to mitigate the health impacts of this new normal, including surges in complaints of musculoskeletal (MSK) conditions. We conducted a study of 1,040 employed Americans to understand the state of MSK conditions in the U.S. today. In this report, you'll learn how prevalent MSK conditions of all types are in today's workforce, the impact of remote work and other lifestyle factors on MSK pain, and employees' shifting attitudes toward treatment options, including traditional and virtual physical therapy.

This survey was conducted in October 2020 via SurveyMonkey. The sample included 1040 employed Americans (working part- or full-time) aged 18-99+ across all regions of the United States. Data analysis was performed by SWORD's Clinical Validation team.



1040
respondents



Working
full or part time



18 - 99+
years old





Pain in the workforce is surging

Musculoskeletal conditions affect a growing proportion of the workforce. Previous reports¹ have estimated the number of Americans suffering from musculoskeletal issues to be around 50% of the population, but our research has found that in the wake of the pandemic, the number may be significantly higher than that. In our study, almost 80% of respondents claimed to be suffering from some kind of musculoskeletal pain, with 79.2% of pain sufferers reporting pain in more than two areas of their body.

For two-fifths (40.5%) of pain sufferers, the pain is new - less than three months old - and among those for whom the pain is chronic (defined as pain that has lasted more than 12 weeks), 37.9% have experienced an increase in pain since the pandemic began.

¹ The Burden of Musculoskeletal Diseases in the United States, U.S. Bone and Joint Initiative

Back, neck and shoulder pain is most prevalent

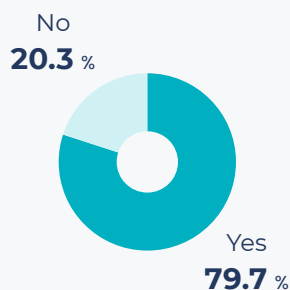
In which area(s) of your body are you feeling pain?



Base: suffering from pain in back, muscles or joints

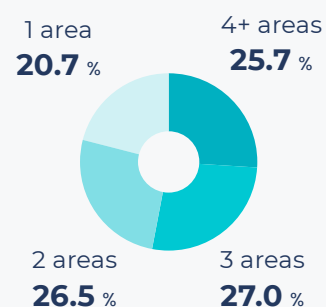
Almost 80% of respondents are in pain

Are you currently suffering from pain in your back, muscles or joints?



Almost 80% of pain sufferers have pain in more than one area

In which area(s) of your body are you feeling pain?



Base: suffering from pain in back, muscles or joints



Remote work is causing more pain, but office setups aren't to blame

The majority of the workforce is still working remotely and will be for some time to come. Our study found that over half (59.7%) of respondents are working from home, either every day or some days. Since the pandemic began, we've heard many theories about the potential impact of remote work on MSK conditions. Suboptimal office setups are often cited as a contributing factor, but our analysis has uncovered a different culprit.

Is working remotely causing more pain? Our signs point to yes. Almost half (42.1%) of those working from home at least some workdays are feeling new pain (defined as pain that has started in the past three months). Additionally, 22.8% of respondents that suffer from chronic pain and are working from home reported that their pain has gotten worse since the pandemic began.

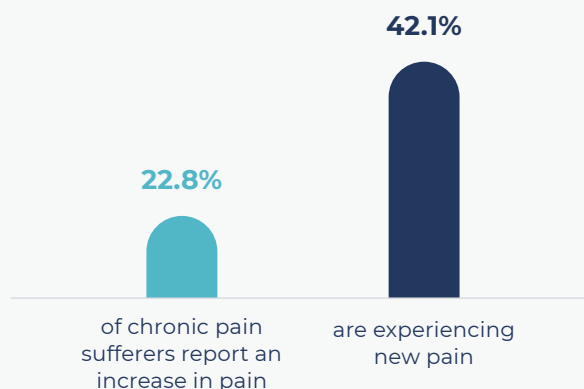
Increases in pain among those working from home are at best only marginally related to the quality of their office setup.

Is the office setup to blame? That one's a no. The increase in pain symptoms and intensity among those working from home seems to be, at best, only marginally related to the quality of their office setup. Pain was equally prevalent irrespective of workspace setup: 80.2% among those working on a desk or table in a dedicated office space; 84.7% among those working from a desk or table in a non-dedicated office space such as a living room, bedroom, kitchen, or dining room, or 81.3% among those working in a non-dedicated space without a desk or table.

So if it's not suboptimal office spaces that are leading to more pain, what could the culprit be?

Working from home is associated with new or increased pain

Of those currently suffering from pain and working from home...



Base: suffering from pain in back, muscles or joints, working from home some or all days



The real culprit is lack of movement

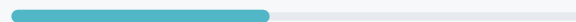
It is well known that lack of movement for prolonged periods of time can lead to MSK pain. Our bodies were designed to move, and the shift to a remote work lifestyle brings with it a whole lot less movement for most people. All of the small, incidental movements associated with commuting, walking from meeting to meeting and picking up lunch – things that can help prevent and relieve pain – have been significantly reduced in their day-to-day lives. Our research shows it’s probable that this lack of movement is what’s really responsible for some of the surge in MSK pain: Of those working from home, almost half (43.6%) of those who reported moving the same or less are in pain, compared to just 8.1% of those who claimed to be moving more.

Interestingly, even a commute can be protective against pain. The biggest gaps in pain prevalence were found between those working from home only some days (26.1%) and those working from home either every day (34.7%) or not at all (38.4%), suggesting that those who vary their work environment by commuting into a workplace on some days are slightly less likely to be in pain.

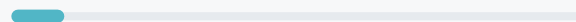
Movement may be the antidote to WFH pain

Of those working from home...

43.6 % moving the same or less are in pain



8.1 % moving more are in pain



Base: suffering from pain in back, muscles or joints, working from home some or all days



Even a commute can be protective against pain. People who commute on some days are less likely to be in pain.



It's affecting our minds as well as our bodies

Much has been written about the impact of the pandemic on mental health. In our study, 76.2% of all respondents claim to have experienced depression and/or anxiety since the pandemic began. We sought to understand the role of MSK pain in mental health, and found, not surprisingly, that increases in pain are correlated with increases in mental health issues. Those in chronic pain are one and a half times as likely to respond with depression or anxiety to serious life and world events. For instance, 31.8% experienced an increase in depression and anxiety since the pandemic began, compared to just one in five of those who had pain for fewer than three months (19.9%) or those who did not experience pain at all (18.6%).

Of those who experienced an increase in depression, anxiety, and panic since the pandemic began, they were three times more likely to have chronic pain. (59.9% vs. 24.0%)



Chronic pain makes people 3x more likely to experience mental health issues

Among those who have experienced an increase in feelings of depression, hopelessness, sadness, anxiety or panic during the pandemic...

Chronic pain (more than three months):

59.9 %

New pain (less than three months):

24.0 %

Base: have experienced an increase in feelings of depression, hopelessness, sadness, anxiety or panic since the pandemic began (March 2020)

Those in chronic pain are one and a half times as likely to respond with depression or anxiety to serious life and world events.



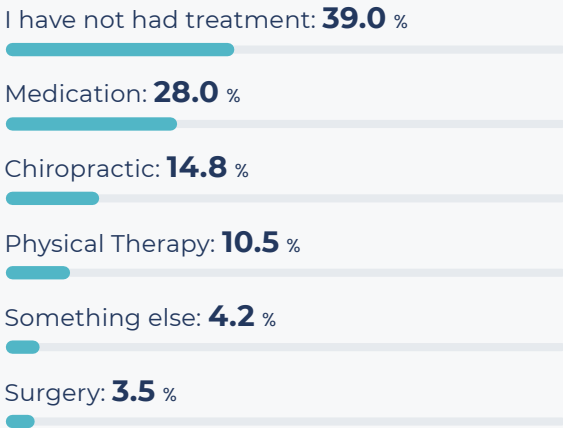
Pain is largely going untreated

The majority (39.0%) of people in pain have not sought treatment in the last six months. Among those who are treating their pain, almost a third (28.0%) are taking medication, and a small percentage have undergone surgery (3.5%). And while physical therapy has been shown to be an effective treatment for MSK pain², only about one in ten respondents have seen a physical therapist for their condition.

untreated pain sufferers said that they haven't pursued treatment because they don't feel safe going into a hospital or clinic right now. The lack of convenience of many MSK treatments also continues to be an issue: over a quarter (26.3%) of pain sufferers report that they haven't had treatment because they haven't had the time. Lack of appointment availability or appointment cancellations only contributed marginally to treatment barriers.

Over a third of pain sufferers haven't had treatment

Have you had any of the following treatments for your pain in the last six months?



Base: suffering from pain in back, muscles or joints



The pandemic has caused many people to reconsider going into clinics and hospitals for fear of infection, and our research confirms that MSK sufferers are no exception. Almost a third (29.1%) of

² Centers for Disease Control, Guideline for Prescribing Opioids for Chronic Pain — United States, 2016



Of those who have not treated their pain at all, more than half (57.9%) claim that they haven't pursued treatment because they don't think the pain is bad enough. MSK conditions, like many medical issues, are best treated early. The longer we experience pain, dysfunction, and range of motion limitations, the more our nervous system, movement patterns, and behaviors will change in response, and the worse the condition can get.



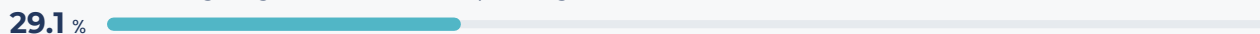
Safety and time are getting in the way of treatment

Why haven't you had treatment for your pain since the pandemic began?

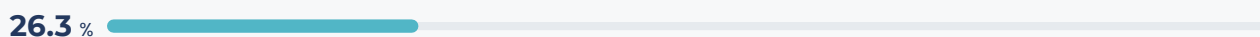
I don't think the pain is bad enough:



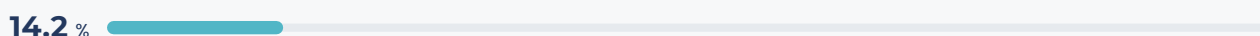
I don't feel safe going to a clinic or hospital right now:



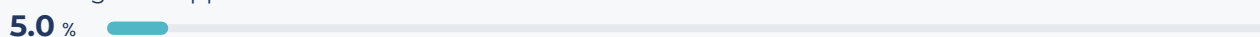
I haven't had time:



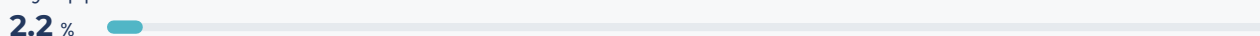
Another reason:



I can't get an appointment:



My appointment was canceled:



Base: have not had treatment for pain in the past six months

Almost a third (29.1%) of untreated pain sufferers said that they haven't pursued treatment because they don't feel safe going into a hospital or clinic right now.

Physical therapy is seen as expensive, time consuming and unsafe

There is substantial clinical and real-world evidence that physical therapy is effective in managing chronic pain as well as speeding recovery from acute injuries and surgery^{3 5}, but the gap between those who would consider treatment and those who actually pursue it remains high. We asked respondents who had not had treatment as well as those who had pursued a treatment other than physical therapy whether they would consider physical therapy to treat their pain. A total of 524 respondents (63.2% of all pain sufferers) said that they would consider physical therapy: six times as many as the 87 pain sufferers (10.5%) who have had physical therapy.

Among those who would consider PT but have not pursued it, cost is the highest barrier to treatment (31.5%) . Time and safety are less of a concern for these respondents yet still remain a barrier: one fifth (18.1%) report not having enough time, and a similar proportion (16.9%) don't feel safe going to a clinic right now.

³ Westby MD, Brittain A, Backman CL. Expert Consensus on Best Practices for Post-Acute Rehabilitation After Total Hip and Knee Arthroplasty: A Canada and United States Delphi Study. Arthritis Care Res (Hoboken). 2014

⁴ Madera, M., Brady, J., Deily, S., McGinty, T., Moroz, L., Singh, D., Tipton, G., & Truumees, E. The role of physical therapy and rehabilitation after lumbar fusion surgery for degenerative disease: a systematic review, Journal of Neurosurgery, 2017

Two-thirds of untreated pain sufferers would consider physical therapy

Which treatment(s) would you have considered?

Physical Therapy: **57.6 %**

Medication: **49.2 %**

Chiropractic: **47.4 %**

Surgery: **7.4 %**

Base: have not had treatment for pain in the past six months

Cost, time and safety are barriers to pursuing physical therapy

Why haven't you done physical therapy yet?

It's too expensive: **31.5 %**

I don't have time to do it: **18.1 %**

I don't feel safe going to a clinic right now: **16.9 %**

Another reason: **11.6 %**

I need a prescription: **9.2 %**

I'm not sure it'll work for my pain: **9.2 %**

I can't find a physical therapist near me: **3.6 %**

Base: have not had treatment for pain in the past six months or have had treatment other than physical therapy (337)

⁵ Littlewood C, Bateman M, Clark D, Selfe J et al. Rehabilitation following rotator cuff repair: a systematic review. Shoulder Elbow 2015



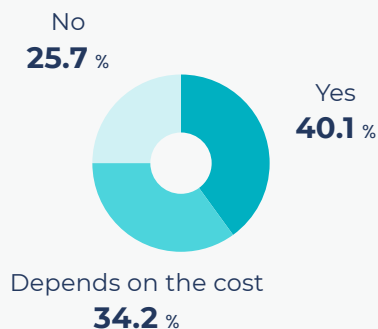
The majority of pain sufferers would consider virtual physical therapy, but most want licensed PTs to provide the care

The pandemic has changed the way patients view telemedicine, and physical therapy is no exception. Almost three-quarters (74.3%) of all pain sufferers would consider a virtual physical therapy solution. Of those, over two-thirds (67.5%) think that care from a licensed PT, not a non-clinical health coach, is important when choosing a virtual PT provider. About half of pain sufferers believe that proven efficacy (52.8%), a large patient base (46.6%) and the ability to see how they're performing their exercises in real time (44.9%) are important (respectively).

Over two-thirds of those who would consider virtual PT think that care from a licensed PT, not a non-clinical health coach, is important.

Three-quarters of pain sufferers would consider virtual PT

Would you consider a virtual PT treatment that you could do at home?



Base: suffering from pain in back, muscles or joints

Care from a licensed physical therapist is important

Which of the following would be important to you in choosing a virtual physical therapy provider?

Care from a licensed physical therapist, not a health coach: **67.5%**

Proven to work for people like me: **52.8%**

A provider that has treated many other people before: **46.6%**

The ability to see how I'm performing my exercises in real time: **44.9%**

The ability to chat to my physical therapist anytime: **31.8%**

Something else: **3.4%**

Base: would consider virtual PT (yes and depends on cost)

Recommendations for employers

The high incidence of untreated MSK conditions and comorbid mental health issues in today's workforce is concerning, but need not be cause for alarm. For employers with large numbers of remote workers, educating employees on the value of movement and implementing programs to encourage more movement can be protective. To help those already in pain but resisting treatment for safety, cost and convenience reasons, employers should consider adding a robust digital solution to their MSK solution set. Adding a solution like SWORD Health that combines therapeutic exercise with behavioral interventions can help those with new pain resolve the issue before it becomes chronic. For those with chronic conditions, a high-quality digital solution can relieve the pain and prevent it from progressing so far that surgery is desired or required. Implementing a digital MSK solution now can improve employees' wellbeing, mental health and productivity in this challenging time, and importantly, it can also reduce the likelihood of a spike in surgeries and other costly treatments once the pandemic has subsided.





About SWORD Health

SWORD Health is a digital musculoskeletal (MSK) care provider on a mission to free two billion people from chronic and post-surgical pain. The company's clinical-grade digital therapy platform pairs expert physical therapists with FDA-listed wearable technology to deliver a personalized treatment plan that is more effective, easier and less expensive than the traditional gold standard of care. SWORD Health believes in the power of people to recover at home, without resorting to imaging, surgeries or opioids. Since launching in 2015, SWORD Health has worked with insurers, health systems and employers in the U.S., Europe and Australia to make quality physical therapy more accessible to everyone.


To learn more about SWORD Health, visit www.swordhealth.com



How Concordia Plans
mobilized in a pandemic
to cut pain and surgeries in half



SWORD Health was a lifesaver during this pandemic when I began to experience lower back pain. What a gift to be able to have first-class physical therapy at home. After 7 weeks I feel like a new man. I recommend SWORD Health to anyone who needs physical therapy, even when there is no pandemic!



Arthur, SWORD member



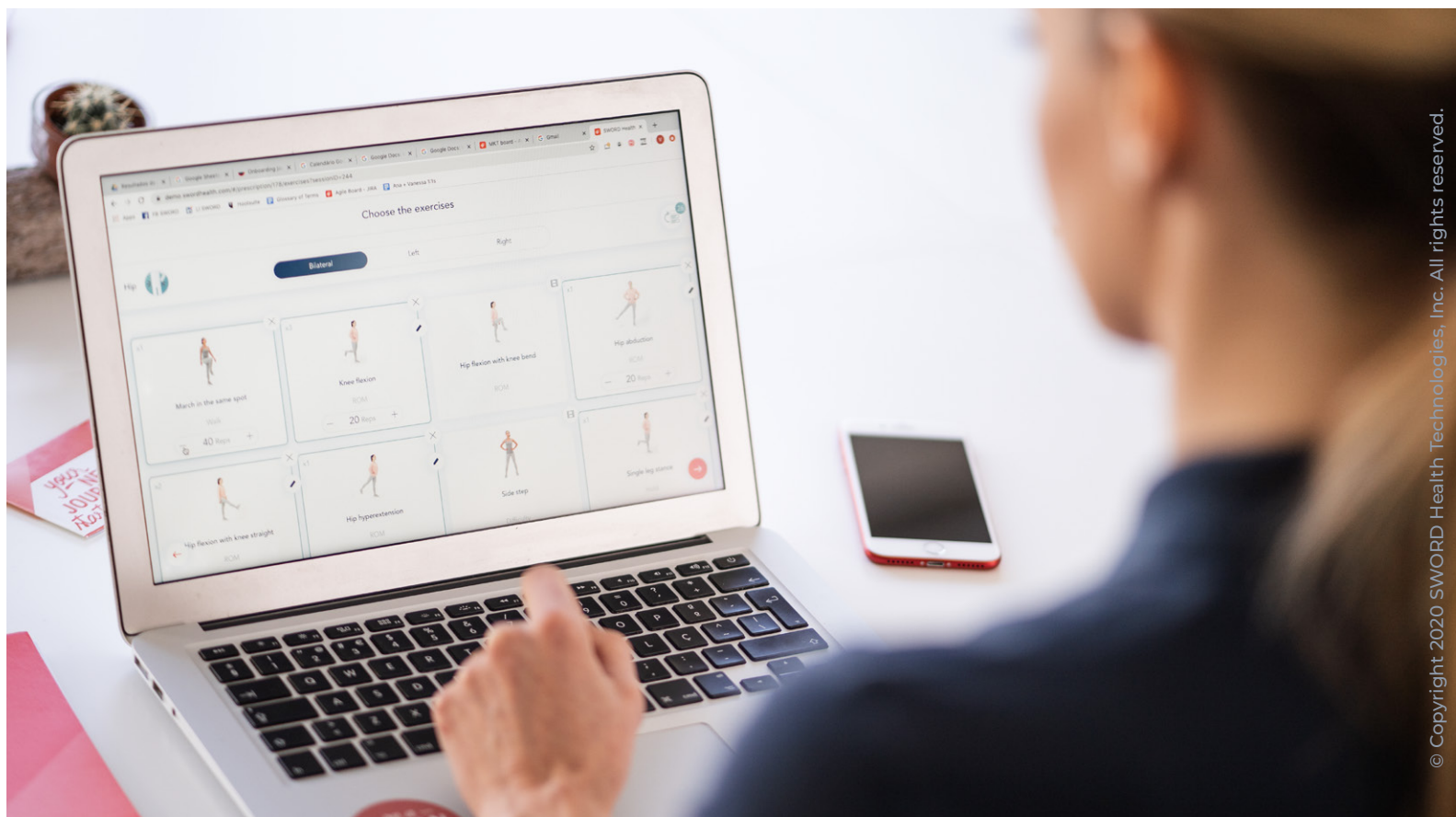
THE CHALLENGE

How do you treat pain in a pandemic?

One in two Americans is struggling with musculoskeletal (MSK) pain, and treating these issues costs the healthcare system more than cancer and mental health combined. Physical therapy (PT) is effective at treating these conditions, but it's too inconvenient to stick to, so people resort to expensive elective surgeries, medications and injections to find relief. The team at Concordia Plans had identified that this was an issue worth addressing, and had planned to look for a solution in the 2020 benefits year.

When the COVID-19 pandemic hit, even fewer people had access to great MSK care. PT clinics were closed, and hospitals delayed elective surgeries and other treatments. To make matters worse, as many in the workforce transitioned to working from home, there was a surge in MSK issues.

Concordia Plans knew they needed to do something about this, and fast. Their members do important work in service of the Lutheran community, and they couldn't afford - and didn't deserve - to be in pain.



THE SOLUTION

Implementing a clinical-grade solution in record time

Concordia Plans worked with SWORD Health on an accelerated launch plan to give their members access to clinical-grade care for their MSK conditions as quickly as possible. We launched the program a mere 15 days after signing the contract.

The benefit was launched on June 14th, 2020 to the entire eligible population. The outcomes in this case study reflect the impact on enrolled members who had completed 8 weeks of the SWORD program as of September 21st. Each member is matched with a licensed physical therapist and completes their exercise program using SWORD's FDA-listed Digital Therapist.

watch video



One of, if not the, most efficient implementation process I have ever been a part of. So many times we left meetings and heard from internal stakeholders "can all of these go this easily?!" Implementation was a dream with the SWORD team.

Sara Correnti,
Concordia Plans

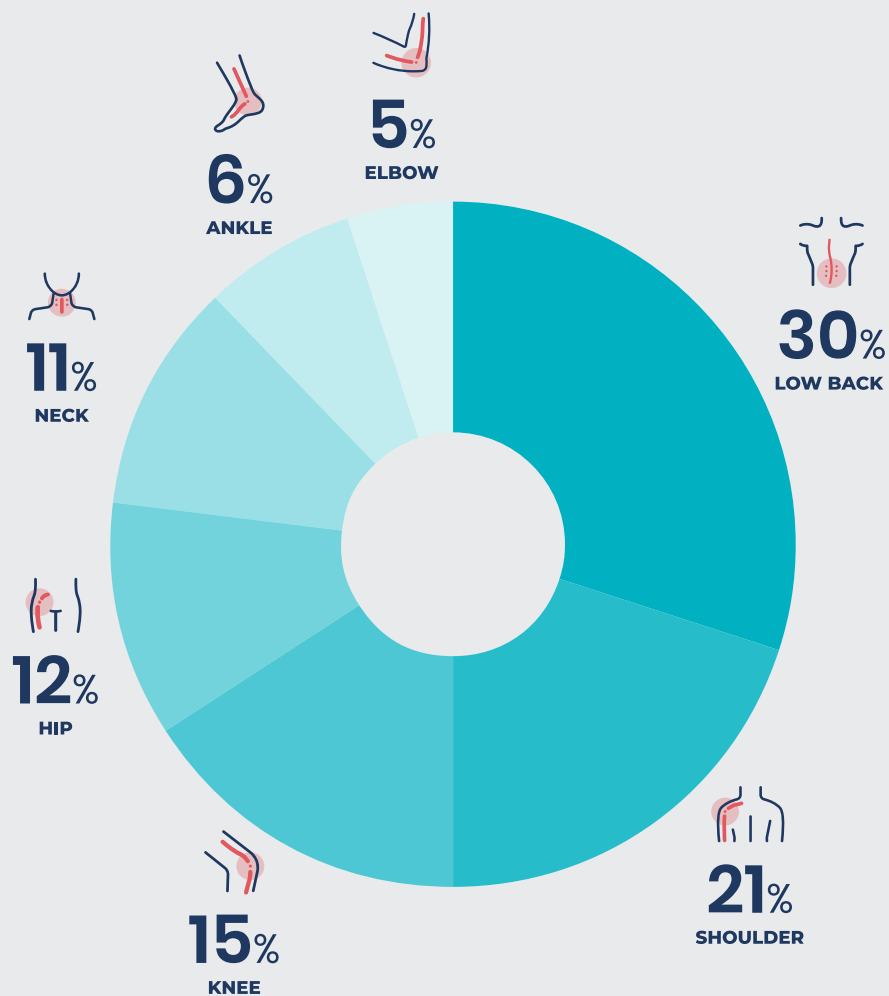




A solution that works for *everyone*

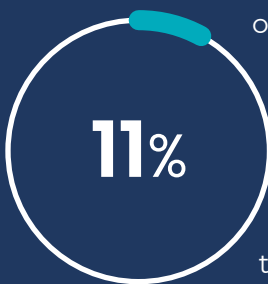
Concordia Plans' member base is diverse, and so are their MSK conditions. SWORD is treating Concordia Plans members with all types of MSK pain, and at every point in the journey, from acute injuries to chronic pain.

Members have a wide range of MSK conditions



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Addressing *the true* source of pain



of Concordia Plans members received a different kit from the one they ordered, indicating that their pain was referred from another source. Only a physical therapist is able to understand and address the true source of pain. To learn more about referred pain and the consequences of misdiagnosis, [click here](#).

THE RESULTS

Less physical pain, less reliance on surgery and medication

Concordia Plans members are enjoying the benefits of less physical pain, are less likely to consider costly interventions such as surgeries, and are less reliant on medication.

After 8 weeks, members have cut their pain levels in half...

↓ 50% PAIN

... and are almost half as likely to consider surgery.

↓ 40% SURGERY INTENT

We have rescued one in four members from pain medications...

24% FEWER MEMBERS ARE TAKING PAIN MEDS

... and reduced medication intake by half in the others.

↓ 48% MEDICATION CONSUMPTION

Just 8 weeks and lots of exercises later I am virtually pain free and back to my normal exercise routine.

Kim, SWORD member



THE RESULTS

Better mental health and productivity

Depression, anxiety and MSK conditions often go hand in hand, and improving physical health leads to better mental health and quality of life. Concordia Plans members who have completed the first eight weeks of our programs are seeing meaningful decreases in their depression and anxiety levels, and increases in productivity and quality of life.

Of the members who were depressed and anxious at the beginning of their program...



1 in 2 members
scored below the threshold
for depression at week 8



1 in 3 members
scored below the threshold
for anxiety at week 8

SWORD members who completed the program are more productive

↑ **32%**

increase in
productivity

THE RESULTS

A program that's **easy to use** and **stick with**

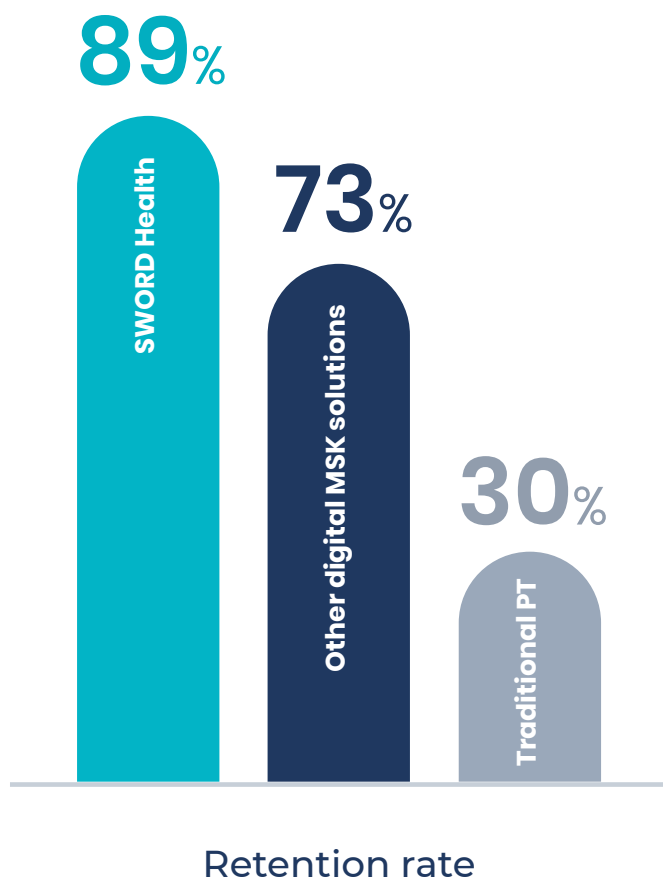
Physical Therapy only works if you stick with it, and adherence rates in traditional PT are strikingly low. SWORD's solution encourages adherence with real-time feedback, gamification and accountability from the physical therapist every step of the way - and the results show for themselves.

Between family and work obligations, I found it difficult to "find the time" for physical therapy. The SWORD Health digital therapy program has been a fantastic fit for me - I can follow my physical therapy program when and even where it works best for me.

Jason, SWORD member



Average member satisfaction



THE RESULTS

What's next: Real Returns

SWORD's digital MSK solution isn't just getting great outcomes for Concordia Plans members. It's having a real impact on their MSK costs, too. To sign up for outcomes and ROI updates, or to learn more about SWORD and see our solution in action, [click here](#) or scan the QR code to your right.



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SWORD HEALTH

www.swordhealth.com