



# Company fact sheet



## At a glance

Founded in 1980 | 1,600 teammates  
WellSky.com

## About WellSky™

WellSky is a technology company advancing human wellness worldwide. Our software and professional services address the continuum of health and social care, helping businesses, organizations, and communities solve tough challenges, improve collaboration for growth, and achieve better outcomes through predictive insights that only WellSky solutions can provide. WellSky is leading the movement for smarter, whole-person care with a visionary approach that addresses individuals' unique health and social circumstances.

A portfolio company of TPG Capital, WellSky serves more than 14,000 client sites around the world, including the largest hospital systems, blood banks and labs, home health and hospice franchises, government agencies, and human services organizations.

Informed by more than 40 years of providing software and expertise, WellSky anticipates providers' needs and innovates relentlessly to help people thrive. Our purpose is to empower care heroes with technology for good, so that together, we can realize care's potential and maintain a healthy, flourishing world.

## Leadership



**Bill Miller**  
Chief Executive Officer



**Steve Morgan**  
Chief Operating Officer



**Robert Watkins**  
Chief Financial Officer



**Tim Ashe**  
Chief Clinical Officer



**Joel Dolisy**  
Chief Technology Officer



**Shoma Sarkar Thomas**  
Chief Marketing Officer



**Tim Kostner**  
Chief Growth Officer



**Wes Little**  
Chief Analytics Officer



**Geoff Nudd**  
CEO & Founder, ClearCare

## Care environments

WellSky serves organizations that deliver care to patients in hospitals, at home, and in practices and facilities. WellSky also serves organizations that provide human services that improve the quality of life of people in need.



## Locations

World Headquarters  
11300 Switzer Rd.  
Overland Park, Kansas 66210

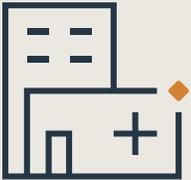
WellSky's team is composed of over **1,600** talented people from all backgrounds in offices across the U.S. and world, including two offices in Europe.

## Commitments

- **Together** we will realize care's potential by helping our clients do good for people and well in business.
- **Together** we will strive to create and maintain a healthy, flourishing world.
- **Together** we will realize our potential as individuals and as a team.

# We partner with organizations across the care spectrum

## Community Care



### Hospital:

Ensuring hospitals can focus on delivering superior patient care safely and efficiently



### Community:

Supporting dynamic communities of care with our diverse set of human services solutions

## Post-Acute Care



### Home:

Empowering providers to deliver exceptional care while focusing on improving outcomes



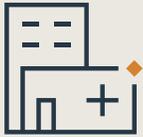
### Practices & Facilities:

Enhancing providers' abilities to streamline operations and focus on the delivery of care

# Positioned to serve a complex and essential care ecosystem



## Community Care



### Hospital

- Blood Transfusion
- Hospital Donor Program
- Donor Testing Services
- Biotherapy Clinics
- Biotherapy Labs
- Blood Centers
- Enterprise Scheduling
- Medication Management
- International Medication Management



### Community

- Behavioral Health & IDD Providers
- Medicaid Programs
- Aging & Disability
- Protective Services
- Community-Based Organizations
- Housing & Homelessness

## Post-Acute Care



### Home

- Home Health
- Hospice
- Home Infusion
- Specialty Pharmacy
- Home Medical Equipment
- Personal Care
- Home Health Therapy
- OASIS Review & Coding
- Billing & Revenue Cycle Services
- DDE & Payer Connection



### Practices & Facilities

- Rehabilitation Facilities (IRF & ORF)
- Private Practice Rehabilitation
- Long-Term Care
- Skilled Nursing Facilities
- Long-Term Acute Care
- Behavioral Health
- Scheduling

# Building on a legacy of impact



## Community Care

## Post-Acute Care



### Hospital

- FDA 510(k) cleared system for blood banks
- The blood compliance solution for U.S. Department of Defense facilities worldwide
- +135 million transfusions and blood donor tests annually
- +450 transfusion sites worldwide
- +20,000 cord blood and tissue donors registered



### Community

- +35,000 daily users
- +3,000 agencies providing services
- +\$4 billion annually in long-term services and supports and behavioral health
- Used by majority of Area Agencies on Aging
- Used by majority of HUD Continuums of Care
- 300,000 people experiencing homelessness cared for



### Home

- +4,500 home health and hospice agencies
- +3.5 million machine learning risk predictions made daily
- 800,000 home health & hospice patients served annually
- 60,000 clinicians trained annually in clinical best practices
- +\$6 billion in personal care services provided annually
- +33 million infusion prescriptions dispensed annually
- +\$11 billion Medicare claims processed



### Practices and Facilities

- Serving 40% of the long-term acute care market
- +4 million specialty hospital annual census
- +5.5 million long-term care annual census
- \$1.7 billion in rehab services provided annually
- +2.3 million rehab patients served annually
- +\$1.5 billion in intellectual or developmental disability (IDD) services provided annually
- Full site of care coverage with post-acute solution portfolio

# Meet our leaders

The WellSky™ leadership team has decades of experience in healthcare and related industries, enabling them to chart a successful course for improving care within our communities while achieving the company's strategic goals.



## Bill Miller

### Chief Executive Officer

Bill Miller is the CEO of WellSky and a recognized leader in the healthcare industry. He has a rich background that includes a more than 20-year history of bringing groundbreaking growth strategies and technological innovation to the healthcare marketplace and a proven track record of launching and leading highly successful healthcare IT companies.

Prior to joining WellSky in July 2017, Bill served as the CEO of OptumInsight, a division of Optum, which is the health services platform of UnitedHealth Group. Under Bill's leadership, OptumInsight experienced unprecedented revenue growth, expanded margins, and claimed a transformative position in the health services market. He led the evolution of Optum into the leader in healthcare analytics and launched several tech-enabled business platforms.

Prior to OptumInsight, Bill served as senior vice president of technologies at Cerner Corporation, where he had global responsibility for the company's managed services, outsourcing, and technology services business units. A graduate of the University of Kansas, Bill earned his bachelor's degree in economics and a master's degree in urban planning and public policy.

# Together we can realize care's potential



## Steve Morgan

### Chief Operating Officer

Steve Morgan serves as chief operating officer for WellSky and is responsible for setting direction and executing against the company's strategic objectives and priorities. With 17 years of industry experience, a passion for company culture, and an emphasis on the client experience, Steve leads WellSky's diverse teams focused on optimizing client workflows, efficiencies, and outcomes.

Prior to joining WellSky in June 2018, Steve served as COO for OptumInsight, a division of Optum, which is the health services platform of UnitedHealth Group. Steve was broadly responsible for the company's annual operating plan with a focus on teammate engagement, client management, growth, and innovation. He was fundamental to the growth and strategic scalability of OptumInsight on an organic basis and through the completion of several critical acquisitions that were integrated into the company. Steve holds a bachelor's degree in accounting and business administration from the University of Kansas.



## Robert Watkins

### Chief Financial Officer

Robert "Bob" Watkins started at WellSky as corporate controller in 2008. In 2011, he was promoted to vice president and corporate controller and to CFO in 2012. Prior to joining WellSky, Bob held a number of financial management positions, including serving as corporate controller for Titan Machinery (TITN), a \$1 billion provider of agricultural and construction equipment. His prior experience also includes a corporate controller position at AFS Financial, where he also served as chief financial officer. Bob is a current member of the AICPA and Financial Executives International.



### Joel Dolisy

#### Chief Technology Officer

In his role as chief technology officer, Joel Dolisy manages both product development and information technology for WellSky. Before joining WellSky as CTO, Joel was CTO of Kinnser Software, where he led the company's engineering and product organizations. Before Kinnser, Joel was SVP, CTO, and CIO for SolarWinds, a leading provider of IT management software. With more than 20 years of experience in product strategy and software engineering, Joel is a leader in developing and delivering commercial software products to market.



### Tim Ashe

#### Chief Clinical Officer

Tim Ashe is the chief clinical officer at WellSky and president of Fazzi Associates, the consulting division helping organizations improve quality, profitability, and efficiency. Tim's expertise and career has included a unique blend of clinical, operational, fiscal, and academic roles that will help WellSky clients deliver improved care and enhanced outcomes. Tim is a frequent presenter at national and state conferences and is often asked to contribute to industry forums. Tim provides organizational, operational, turn around, clinical, and change management services to organizations across the country.

Prior to joining Fazzi and WellSky, Tim was the vice president of clinical operations for Visiting Nurse Service of Rochester & Monroe County in New York. He was also an assistant professor at the University of Rochester School of Nursing. Additionally, Tim has an extensive clinical background as an ICU nurse, nurse educator, nurse manager, and advanced practice nurse. He earned his Master of Business Administration and Master of Science from the University of Rochester, a Bachelor of Skilled Nursing from St. John Fisher College, and a Bachelor of Science in biology from Nazareth College.



### Shoma Sarkar Thomas

#### Chief Marketing Officer

As the chief marketing officer, Shoma Sarkar Thomas oversees the marketing strategy for all WellSky products and is responsible for building the WellSky brand, which includes public relations, communications, and all strategic marketing activities. Previously, Shoma served as vice president of marketing for Kinnser Software, where she led marketing and strategic growth initiatives. She holds a bachelor's degree in economics and international relations from the University of Virginia.



### Tim Kostner

#### Chief Growth Officer

As chief growth officer, Tim Kostner leads WellSky's long-term growth strategy, which includes aligning sales processes, systems, and teams to successfully establish strategic client relationships. Tim has more than 20 years of experience in healthcare and information technology. Previously, he served as senior vice president of client development at Cerner, where he held executive responsibility for solution and services sales as well as sales operations.



### Wes Little

#### Chief Analytics Officer

As chief analytics officer, Wes Little leads WellSky's unified analytics strategy to deliver data-driven insights and innovative solutions. He previously served as director of product management for Kinnser Software, where he oversaw rapid product innovation for the company's home health electronic medical record software. Wes holds an MBA from the University of Texas at Austin's McCombs School of Business and a bachelor's degree in economics from Washington and Lee University.



### Geoff Nudd

#### CEO & Founder, ClearCare

Geoff Nudd is the CEO and founder of ClearCare, a WellSky company. Under his leadership, ClearCare grew to become the system of record for the personal care industry serving over 4,000 agencies, including 8 of the largest 10 enterprises, and employing over 600,000 caregivers. More recently, Geoff has led efforts with industry leaders to pioneer transformative, integrated care models across home health, hospice, and personal care at national scale, all supported by interoperable technologies. Geoff has over 20 years of experience in software development and is an alumnus of Merrill Lynch and Andersen Consulting. Geoff received his bachelor's degree in engineering from Northwestern University and his MBA from the Kellogg.



**For access to high-res photos of WellSky leadership, contact us today.**

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