

Aligning Resource Allocation and Prioritization

An innovation portfolio approach to accelerating outcomes.

Joshua Tamayo-Sarver, MD, PhD, FACEP, FAMIA, FAIM

Vice President of Innovation, Inflect Health

Vice President of Innovation, Vituity

3 phases. 13 stages. One portfolio.

VIRTUAL CASE HISTORY

Frost & Sullivan

Growth Innovation Leadership Council

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About the speaker

Multidimensional mediocrity, by design.

Each role keeps the next one honest.

SUIT

Twenty years building and running healthcare operations.

SCRUB

Still working three emergency department night shifts a month.

GEEK

Former software engineer. Built clinical AI products now in production.

QUANT

PhD in epidemiology and biostatistics. Runs the math when nobody asks.

WHERE I DO THIS WORK

Vituity

Physician owned. 900+ practice locations. 6,000+ clinicians. Acute, peri-acute, post-acute.

Inflect Health

Vituity's innovation arm. Three coordinated functions:

Inflect Capital.

Invests in early-stage healthcare ventures.
Inflect Studio.

Builds new products from inside the clinical floor.
Inflect Advisory.

The portfolio problem most leaders inherit

Three failure modes that turn an innovation portfolio into a budget exercise.

01

Same review, each idea

We score a pre-revenue prototype on the same template as a scaling business line, then wonder why neither moves forward.

02

False equivalence in resourcing

An MVP that needs two engineers and four months is funded like a deployment that needs a sales team and a year. So both starve.

03

Killing winners, propping up losers

Without a stage-aware kill rule we extend dying projects to protect last year's narrative and stall the ones approaching product-market fit.

The fix is not a better scoring template. It is a portfolio that knows what stage each idea is in.

Reframe the question

Stop asking which ideas to fund.

Start asking what stage each idea is in, and what that stage needs.

BEFORE

Idea-by-idea funding

- One scoring rubric for everything.
- Annual budget cycle, not learning cycle.
- Success measured at the program level only.
- Kill decisions are political, not procedural.

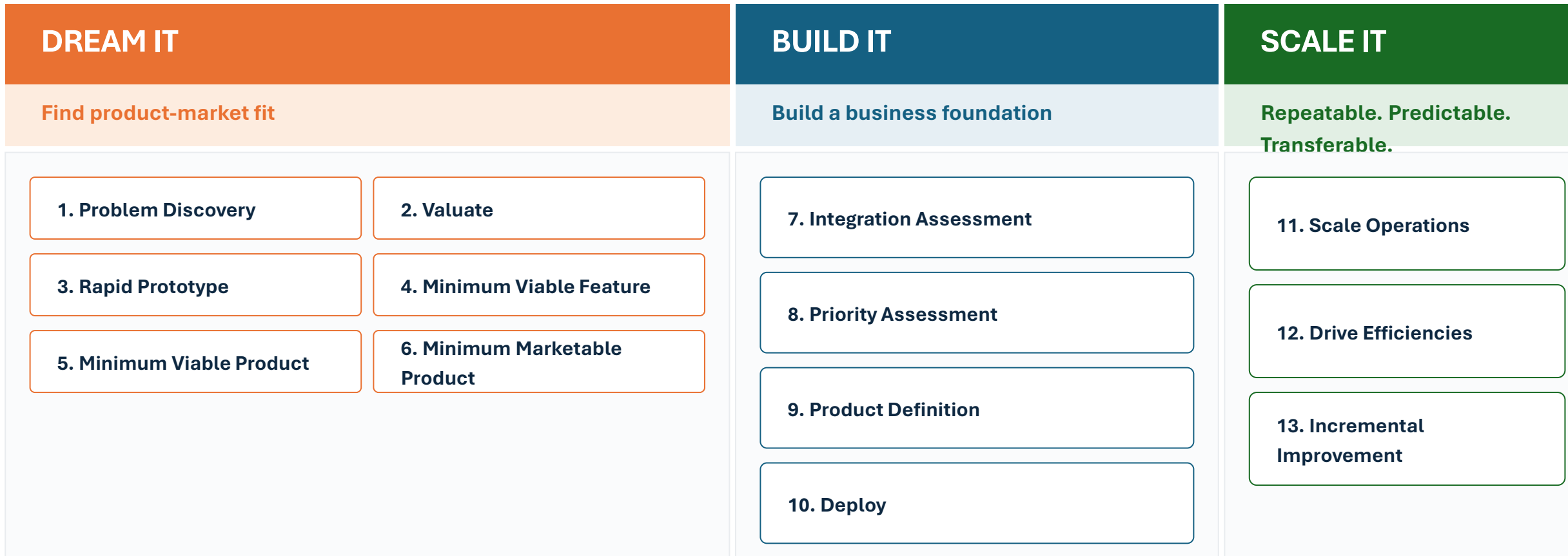
AFTER

Stage-aware portfolio

- Each stage has its own goal and hypothesis to test.
- Resourcing matches the skillset the stage requires.
- Movement between stages is the unit of progress.
- Kill, skip, and re-enter rules are documented.

The Innovation Portfolio Framework

Thirteen stages, organized in three phases. An idea advances only when its hypothesis is answered.



Each stage owns a falsifiable hypothesis. Each transition is a documented decision.

Phase 1 | Dream It

DREAM IT

Take a new idea through product-market fit by adapting to customer signal.

1

HYPOTHESIS

Problem Discovery

We understand the problem space uniquely.

SKILLSET

Creativity, subject matter expertise, customer empathy.

2

HYPOTHESIS

Valueate

Solving it is worth the likely investment.

SKILLSET

Market research, competitive scan, feasibility.

3

HYPOTHESIS

Rapid Prototype

Solvable with favorable unit economics.

SKILLSET

Low-fidelity prototyping, customer discovery.

4

HYPOTHESIS

Minimum Viable Feature

We can build and distribute the key features.

SKILLSET

SME, product, operations, implementation.

5

HYPOTHESIS

Minimum Viable Product

We can build a solution that will be used.

SKILLSET

Innovation product management.

6

HYPOTHESIS

Minimum Marketable Product

The market will pay with positive unit economics.

SKILLSET

Pipeline focus, fast adaptation.

Phase 2 | Build It

BUILD IT

Take an idea with product-market fit and build a business foundation around it.

7

Integration Assessment

HYPOTHESIS

We can deploy with positive unit economics.

SKILLSET

Enterprise architecture, partnerships, product.

8

Priority Assessment

HYPOTHESIS

Value beats alternatives on our roadmap.

SKILLSET

Enterprise strategy, value modeling.

9

Product Definition

HYPOTHESIS

Fits operational constraints at positive value.

SKILLSET

Enterprise complexity, product depth.

10

Deploy

HYPOTHESIS

Solution can be deployed via a repeatable process.

SKILLSET

Enterprise stretch, delivery rigor.

Phase 3 | Scale It

SCALE IT

Repeatable, sustainable, predictable. Transferable to ops or an external business.

11

Scale Operations

SKILLSET

Sales, distribution, operational excellence.

HYPOTHESIS

Delivery scales through sales, ops, partnerships.

12

Drive Efficiencies

SKILLSET

Unit economics rigor, operational discipline.

HYPOTHESIS

We can optimize cost, ops, and revenue together.

13

Incremental Improvement

SKILLSET

Continuous quality improvement.

HYPOTHESIS

We can keep improving against the market.

Three governance rules that make this work

These rules turn the framework from a poster into a governance system.

01

Meet or justify

Before advancing to the next stage, an idea must meet every prior goal and hypothesis, or have a documented reason to skip.

02

Enter anywhere

An idea can enter at any stage if it has met all prior goals or has a documented reason it does not need them. Acquisitions and partnerships routinely enter mid-stage.

03

Exit anywhere

An idea can exit at any stage. Exit means move external (sell, spin out, license) or kill. Exit is a healthy outcome, not a failure.

Resource by stage, not by idea

Each phase needs a different mindset, skillset, and capital horizon. Mixing them is expensive.

Dimension	Dream It	Build It	Scale It
Mindset	Customer discovery. Rapid pivots.	Enterprise integration. New product management.	Operational standardization.
Core skillset	SME, prototyping, business planning.	Strategy, ops, implementation.	Sales, distribution, ops excellence.
Capital horizon	Months. Small bets, fast feedback.	Quarters. Medium bets, integration cost.	Years. Sustained investment, unit economics.
Failure looks like	Invalidated hypothesis. Cheap.	Unsolvable integration. Medium cost.	Unit economics miss. Expensive.
Team archetype	Founders and SMEs.	Product and ops leaders.	Commercial and ops executives.

Action 1 | Define measurable outcomes

The outcome of an early-stage project is a falsifiable answer, not a revenue number.

OUTCOMES THAT TRAVEL | BY STAGE

Dream It

- Customer interviews per problem hypothesis.
- % hypotheses confirmed vs. invalidated.
- Time from idea to first market signal (days).

Build It

- Integration cost vs. value forecast at decision.
- Priority assessments completed per quarter.
- Deployment lead time and playbook deviation.

Scale It

- Unit economics trajectory by cohort.
- Customer retention and expansion.
- Time and cost to onboard a new site.

PORTFOLIO LEVEL

Throughput

Ideas advancing per quarter, per phase.

Kill rate

Healthy is high in Dream It, low in Scale It.

Dwell time

Median days in stage. Long dwell is a signal.

Conversion

% Dream advances to Build. % Build to Scale.

Action 2 | Run two formal gates

Two gates do almost all the work. Stage 2 and Stage 8. Standardize the questions.

Stage 2

2 Valuate

Before we build anything.

KEY QUESTIONS

- Is the problem worth the likely investment?
- Do we have a unique view of the problem space?
- Could a competitor close this in six months?
- What is the smallest experiment that disproves the bet?

DECISION CRITERIA

Learning velocity. Market size. Founder fit. Defensibility.

Stage 8

8 Priority Assessment

Before we deploy enterprise-wide.

KEY QUESTIONS

- Is the value strategic, monetary, or both?
- What does this displace on the operating roadmap?
- What is the integration cost at our scale?
- Who owns the result a year from now?

DECISION CRITERIA

Strategic alignment. Integration cost. Opportunity cost. Owner.

Action 3 | Data-informed portfolio management

Build a one-page portfolio dashboard. Update it monthly. Use it to govern, not admire.

PORTFOLIO HEALTH | ILLUSTRATIVE DASHBOARD

Active bets in portfolio

23

across all 13 stages

Dream It kill rate (TTM)

62%

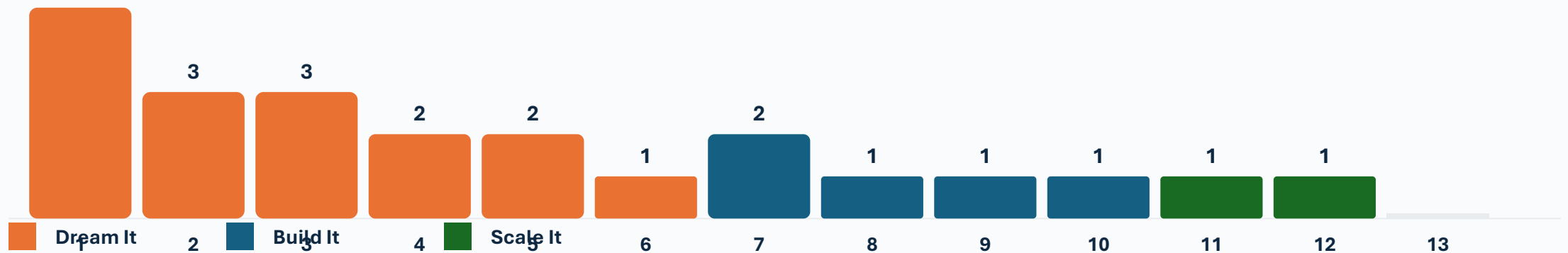
healthy band: 50 to 75%

Conversion Dream to Build

18%

TTM. Prior period 14%.

Active bets per stage



Three case patterns from inside Inflect

Same framework. Three different portfolio outcomes. Each is healthy.

Penmic

Palpation hardware

Stage 1 → Stage 3

Began as a clinician sketch and moved through Stage 3 prototyping at Inflect Studio.

PATTERN

Studio held Stage 2 Valuate as a hard gate. The team pivoted twice before Stage 4. Resource intensity stepped up only after the hypothesis cleared.

CMS-0057-F

Hospital advisory offering

Stage 8 EXIT

Brought to Stage 8 Priority Assessment as an Inflect Advisory expansion bet. Shelved May 2026.

PATTERN

A structural review surfaced an unfavorable integration cost. The general advisory brand thesis lives on. A clean exit is a portfolio win, not a defeat.

MOOV

Vituity wellness brand

Stage 11 → re-enter Stage 12

Already in Stage 11 Scale Operations. Re-entering Stage 12 to drive efficiencies on unit economics.

PATTERN

A mature business can re-enter an earlier stage when its hypothesis has changed. Stage assignment is dynamic.

Takeaways and Q&A

Three things to do Monday morning.

1

Map every active bet to a stage.

Force every initiative to declare its stage and hypothesis. This alone surfaces two-thirds of the misallocation.

2

Run Stage 2 and Stage 8 as formal gates.

These are the two decisions that move the portfolio. Standardize the questions. Document the answer.

3

Build the one-page portfolio dashboard.

Counts per stage. Dwell time. Kill rate. Conversion. Cap concurrent Dream It bets.

Thank you. Questions.

Joshua Tamayo-Sarver, MD, PhD, FACEP, FAMIA, FAIM | joshua@inflect.health | inflect.health