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Dueling visions for healthcare's **AI-powered future**

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As giants in the world of technology, Epic's Judy Faulkner and Alphabet's Ruth Porat are among America's most prominent business leaders. In keynote addresses delivered three days apart in August, they offered sharply differing perspectives on AI's emergent capabilities — and starkly different ideas regarding its application to healthcare.

For me, the differences call to mind a biblical phrase: "Where there is no vision, the people perish" (Proverbs 29:18). I know I am taking it a bit out of context, but alone this idea is relevant to Faulkner's and Porat's positions.

Allow me to elaborate.

A STUDY IN CONTRASTS

Despite Faulkner's larger-than-life presence, she has a limited vision for AI in healthcare. It is small, focused on incremental improvement and zero-sum distribution of reward. By contrast, Porat's vision for AI is holistic, inclusive and expansive. It suggests a rising AI tide will lift all value-creating boats.

In my view, the problem with Faulkner's mental model is that it assumes continuance of U.S. healthcare's failed business models. In her hierarchy of service needs, clinicians come first, healthcare organizations second and patients a distant third.[a] Her perspective is granular and transactional.

Meanwhile, Porat heralds AI's exponential potential for revolutionizing the practice of medicine.

She paints an optimistic portrait of how AI can transform not only healthcare but also health, reversing Faulkner's hierarchy with the implicit idea that promoting *individual and community health* is essential for optimizing human potential. That's a truly visionary stance.

Faulkner and Porat shared their perspectives at two major industry events in August 2025:

- Epic's sci-fi themed 2025 users group meeting (UGM)
- The Kansas City Federal Reserve Bank's more down-to-earth Jackson Hole Economic Policy Symposium

EPIC'S SCI-FI EXTRAVAGANZA

A key takeaway for me from Epic's 2025 UGM was that spectacle cannot overcome a lack of substance.

On Aug. 19, Judy Faulkner, CEO and founder of Epic, took the stage for the annual event in the company's 11,400-seat underground auditorium in Verona, Wisconsin. Speaking to more than 40,000 in-person and online attendees, Faulkner had big AI news: Epic was "making science fiction fact." The massive audience leaned in to hear what "Futuristic Faulkner" had to share.[b]

Dressed like Buzz Lightyear in a lavender wig, bright green glasses, neon green shoes and silver pants, Futuristic Faulkner revealed that Epic is currently developing 200 different AI projects.[c] The big three initiatives are digital assistants for clinicians (Art), revenue cycle professionals (Penny) and patients (Emmie). Having fun with the names, Rock Health in its weekly pulse on

a. Lynn, J., "A deep dive into the announcements at Epic UGM 2025," *Healthcare IT Today*, Aug. 21, 2025.

b. Plas, J.V., "Epic UGM: Futuristic Faulkner sets the AI tone," *In Business Madison*, Aug. 19, 2025.

c. Capoot, A., "Epic touts new AI tools for patients and doctors at company's annual meeting," *CNBC*, Aug. 20, 2025.

digital health wryly observed that "Epic goes APE (Art, Penny, and Emmie)."[d]

The Epic announcements are all sizzle without the steak. The digital assistants will reduce transaction friction, but they will hardly transform a broken industry. For example, Faulkner announced in her keynote speech that a new and improved MyChart will enable users to log in with one set of credentials across all Epic platforms.

She positively gushed when observing, "You [healthcare organizations] will spend less time handling patient calls and resetting passwords. Demographic changes like address need to be added only once."

OK. But does that really represent a huge technological leap?

As Faulkner's remarks illustrate, the healthcare industry treats routine, incremental platform improvements as disruptive innovations. In the process, Epic and almost the entire healthcare industry are missing the approaching AI-powered-health wave that, like a tsunami, will truly disrupt and transform the industry's current business practices.

MOUNTAINTOP CLARITY

Every August since 1982, the Kansas City Federal Reserve Bank has hosted a symposium in Jackson Hole, Wyoming. For three days, central bankers, policymakers, academics and business leaders meet to discuss critical economic policy issues. Each symposium has a theme. This year's theme was "Labor Markets in Transition." This dry title belies the potential that AI has to turbocharge productivity growth by eliminating legions of white-collar jobs.

It was in this context that Porat, who is president and chief investment officer of Alphabet Inc. and its subsidiary Google, provided insight and perspective on AI's potential to transform the global economy. Unlike Faulkner, Porat has

shared her remarks publicly.[e] In its summary of the symposium, *The Tech Buzz* captures the excitement that Porat's AI framework generated:

> Google just made its biggest economic case for AI yet. ... Porat stood before the world's most influential central bankers at Jackson Hole and declared AI [to be] the defining economic force of our generation, capable of driving trillions in global growth over the next decade.[f]

Despite the symposium's focus on global economics and finance, Porat illustrated her "framework for capturing the [AI] opportunity" by first applying it to health. She explains this choice as follows:

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e. Porat, R., "AI breakthroughs are transforming industries, from healthcare to finance," Google company news, Aug. 11, 2025.

f. *The Tech Buzz*, "Google's Porat: AI to drive trillions in economic growth at Jackson Hole," Sept. 5, 2025.

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d. Rock Health, "Epic goes APE (Art, Penny, and Emmie)," Aug. 25, 2025.

▶ The door of Kode, a revenue cycle business in Holland, Michigan, displays a sci-fi theme matching that of the Epic 2025 Users Group Meeting.

PHOTO: DAVID JOHNSON

In thinking about how to bring [AI's potential] to life, rather than drown you in use cases and case studies in the financial services sector, I thought instead that I would share examples within the context of a mental model, which I have found to be useful.

That model is health — which I am going with: First, because it is personal and relevant for all of us, it makes the upside of AI tangible and underscores reasons for optimism about the application of AI; and, second, because life sciences and financial services are two sectors where the upside with AI is particularly relevant due to their dense use of data, allowing AI to assemble insights that can unlock value and deliver outcomes beyond what humans can do without this assist.

Porat details three interconnected ways by which AI can transform health:

- Advancing science
- Promoting early detection
- Improving operational effectiveness

Her logic is clear, systematic and persuasive. Let's explore the components of Porat's model individually.

Advancing science. AI and synthetic biology are this decade's twin breakthrough innovations. With these enhanced capabilities, science is developing a molecular-level understanding of the human body's mechanics. To illustrate this phenomenon, Porat references the capability of a new AI system, AlphaFold, to predict the 3D structure of all human proteins.[g] There are more than 200 million such proteins. It used to take three-to-four years to map a single one. AlphaFold mapped all 200 million in a few months. This knowledge has led to novel cancer cures. It helps solve medicine's

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g. For more about AlphaFold, see McKay, C., "Google DeepMind's Demis Hassabis & John Jumper awarded Nobel Prize in Chemistry," *Maginative*, Oct. 9, 2024.

most intractable problem — how to prevent disease onset.

Early detection and risk management. Early detection constitutes effective risk management. Spotting problems earlier makes them easier to solve. Nowhere is this truer than in healthcare. Through a process that can be aptly called *preemptive diagnostics*, AI can sift horizontally through dense and voluminous health data to enable much earlier disease detection. AI's unparalleled pattern-recognition capabilities mean greater investments in preventive care will reduce the societal need for acute interventions, thereby promoting healthier, happier and more productive populations with far less need for costly medical treatments.

Operational effectiveness. Freeing clinicians from having to immerse themselves in vast quantities of medical research enables them to focus on patients' idiosyncrasies when determining diagnoses and treatment protocols. In this way, Porat argues that, rather than replacing clinicians' judgments, AI accelerates their insights. There's more signal with less noise. False positives and negatives diminish. Treatments are more targeted and effective. Perhaps most important, AI enables clinicians to promote protocols for healthy living and disease prevention.

Porat ended her remarks by stressing the need for effective executive curation of AI tools. She quoted a phrase used by her Google colleague Thomas Kurian: "If you try to let a thousand flowers bloom, you'll end up with a thousand dead flowers."

Getting AI right requires proper organizational design, experimentation and focused execution. Some core tenets of business management never change.

SPARKING INNOVATION AND SHIFTING MINDSETS

In fairness to Faulkner, Epic's platform incorporates some of the AI-powered potential that Porat envisions. The company's Cosmos platform

Epic's position reflects the reality that the biggest obstacle confronting incumbent healthcare organizations is their ongoing belief that healthcare tomorrow will mirror healthcare today.

has the potential to predict disease onset through the analysis of its clients' collective healthcare data. The caveat is that only health systems using the Epic electronic health record and opting into the Cosmos platform can benefit from its insights. This *walled garden* approach to data sharing creates clear winners and losers.

As reported by *Stat's* Britanny Trang, Faulkner made this Epic-centric statement to healthcare organizations when presenting Cosmos' capabilities:

> If you haven't signed up for Cosmos yet, please consider doing so, so you can get these capabilities that go with Epic artificial intelligence and [that will] eventually, we think, be important for the best patient care.[h]

Epic's position reflects the reality that the biggest obstacle confronting incumbent healthcare organizations is their ongoing belief that healthcare tomorrow will mirror healthcare today.

This is not unusual among industries. Kodak misfired on digital imaging. Blockbuster swung and missed on video streaming. Consequently, it's not surprising that so many healthcare incumbents do not see and are unprepared to capitalize on the coming AI-powered health wave.

If science fiction teaches us anything, it's that we have to *imagine* new worlds to be able to create them. Walking downtown recently in Holland, Michigan, I stumbled across the window display that showed an astronaut apparently walking in space, with the message "A world built just for medical coding."

The display's sci-fi theme matches that of the Epic 2025 UGM. Its singular emphasis on medical coding also captures what drives organizational behaviors at Epic and other healthcare incumbents. Despite rhetoric to the contrary, the vast majority of U.S. healthcare organizations operate in ways that optimize treatment volumes and revenues. Patient experience is a secondary consideration. Nothing can change in U.S. healthcare until that mental model for healthcare operations changes.

At the beginning of her Jackson Hole remarks, Porat discussed the evolving character of Google searches regarding AI. Two years ago, the majority of searches focused on AI's downsides (e.g., Will AI replace my job?). Today, most searches focus on AI's upside opportunities (e.g., Can AI cure cancer?).

This mindset shift is significant. Fearing AI gets us nowhere. Being open to its transformative capabilities gets us everywhere. With that in mind, I Googled "How will AI transform health?"

The answers were illuminating. You should try doing it yourself. ∎

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h. Trang, B., "Epic's AI overhaul promises to address EHR headaches for clinicians and patients," *STAT*, Aug. 20, 2025.

About the author

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