

Healthcare without Bounds: Trends in Clinical Communications & Collaboration 2018	
TITLE:	Trends in Clinical Communications & Collaboration 2018
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STUDY OVERVIEW:	<p>Hospitals and health systems surveyed are making significant <u>enterprise-wide</u> investments in Smartphones and secure mobile communications platforms to drive clinical transformation and address the mission- and patient-critical communications requirements of clinical and non-clinical mobile workers within the hospital and across the care continuum.</p> <p>Hospitals surveyed have identified common communications challenges experienced by mobile clinical workers that include:</p> <ul style="list-style-type: none"> • Communications overload. Clinicians are overwhelmed by the overhead paging system, incoming voice and text communications, and a continuous stream of device alarms which is creating alarm fatigue and leaving them little time for direct patient care. • Lack of standardized processes. Clinicians are resistant to utilizing standardized communications processes and tools especially during transitions which can introduce medical errors into care process. • Dissatisfaction with existing communications tools. Clinicians are dissatisfied with antiquated communication options provided by hospital IT including overhead paging, landline phones, pagers, and proprietary VoIP handsets. <p>With the transition toward patient centered care and value-based purchasing, hospitals surveyed are evaluating next generation platforms and upgrading their technical infrastructure to help achieve the Triple AIM framework by enhancing team-based communications and collaboration, streamlining workflow processes, and improving care coordination.</p> <p>Developed comprehensive mobile strategies. 73 percent of hospitals surveyed have developed or were developing mobile strategies to address the communications, collaboration, and computing requirements of clinical professionals and other mobile workers across medical departments, standalone hospitals, and ambulatory environments.</p> <p>Identified compelling return on investments. 48 percent of hospitals surveyed have identified or were identifying compelling ROI models to justify mobile investments that provide quantifiable metrics to demonstrate cost reductions, outcome improvements, and staff/patient satisfaction.</p> <p>Leveraged middleware to support event-driven notifications. 68 percent of hospitals surveyed are using middleware to collect, monitor and manage data, alerts and alarms generated from hospital legacy systems including nurse call, biomedical devices, EHR, pharmacy, and laboratory.</p>

<p>STUDY METHODOLOGY</p>	<p>Trends in Clinical Communications & Collaboration presents the findings of an end-user market study identifying the market opportunities and challenges for hospitals and health systems within the United States who are evaluating large-scale investments in Smartphones and secure mobile communications platforms to address the mission- and patient-critical communications requirements of clinicians, ancillary healthcare professionals, and other mobile hospital workers within the hospital and across the care continuum.</p> <p>Content for Trends in Clinical Communications & Collaboration was derived from more than 100 in-depth interviews with healthcare professionals working in hospital-based environments who are technically competent and representative of a broad range of medical specialties, organization types, and organization sizes.</p> <p>The telephone interviews were conducted over a three-month period starting in September 2017. During the interviews, Spyglass identified the market requirements for Smartphone-based communications platform through discussions about:</p> <ul style="list-style-type: none"> • workflow inefficiencies in communicating with care team members and patients, • current usage models for Smartphones and mobile communications solutions, and • barriers for widespread mobile communications adoption. <p>Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these solutions.</p>
<p>TARGET AUDIENCE</p>	<ul style="list-style-type: none"> • Software and hardware vendors, systems integrators and management consulting groups who are selling hardware, applications and services into the healthcare industry • Healthcare administrators and IT executives who are making strategic decisions to fund clinical information technology solutions • Clinicians who are involved in informatics and clinical system evaluation and selection • Investment banking and private equity investors

ABOUT SPYGLASS
CONSULTING
GROUP

Spyglass Consulting Group is a market intelligence firm and consultancy focused on the nexus of information technology and healthcare. Spyglass offers products and services in customer and market intelligence, strategic partnership development, product marketing and investment due diligence. Spyglass' current research is entitled **Healthcare without Bounds** that focuses on the current and future potential of mobile computing and wireless technologies within the healthcare industry.

Spyglass customers include more than 140 leading high technology vendors, management consulting organizations and healthcare providers including **Cisco, IBM, Microsoft, Intel, Hewlett Packard, Johnson & Johnson, Pfizer, Siemens, GE Healthcare, Philips Medical, Sprint, and Kaiser Permanente.**

Gregg Malkary is the **founder** and **Managing Director** of **Spyglass Consulting Group**. He has more than 20 years' experience in the high technology industry working with Fortune 2000 companies to help them use information technology for competitive advantage. Malkary has domain expertise in mobile computing, wireless and broadband technologies with direct experience in the healthcare, hospitality, manufacturing, communications and entertainment markets.

Prior to founding **Spyglass Consulting Group** in August 2002, Malkary was an Associate Partner at **Outlook Ventures**, a venture capital firm focused on early stage investments in enterprise software and communications companies. Previously, Malkary was the Director of Strategic Planning for **Exodus Communications** where he was responsible for identifying, evaluating and executing growth initiatives for Exodus in the managed web-hosting marketplace. Malkary has also held consulting and senior management roles in business development, strategic planning and product marketing for public and private technology companies including **IBM, Hewlett Packard, Accenture, Silicon Graphics** and **Skytel Communications**.

Malkary frequently speaks at regional and national conferences focused on mobile computing, wireless technologies and healthcare related issues. Numerous industry publications have written about and quoted Malkary including the *Wall Street Journal*, *CIO*, *Business 2.0*, *MIT Technology Review*, *Network World* and *eWeek*.

Malkary is an honors graduate of **Brown University** having earned a MS and BA in Computer Science. He was awarded the prestigious North American Philips Corporation Fellowship for his graduate research work in graphical simulation environments.

For additional information about this study, please contact Gregg Malkary at gmalkary@spyglass-consulting.com.

Trends in Clinical Communications & Collaboration

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IN THIS STUDY.....6

METHODOLOGY.....6

TARGET AUDIENCE6

INTRODUCTION.....7

EXECUTIVE SUMMARY8

LONGITUDINAL COMPARISONS WITH 2016 STUDY10

DEMOGRAPHICS13

ACKNOWLEDGEMENTS.....18

MARKET STUDY RESULTS.....20

COMMUNICATIONS CHALLENGES.....20

 What challenges do clinicians face communicating with colleagues and team members? 20

COMMUNICATIONS INVESTMENTS23

 Strategy. Has hospital IT developed an enterprise-wide mobile communications strategy?..... 23

 Priority. Are Smartphone-based communications a hospital IT investment priority? 26

 Return on Investment. Has hospital IT identified a compelling ROI for a Smartphone-based communications platform? 28

COMMUNICATION DEVICES.....32

 Hospital-Owned Smartphones..... 32

 Investments. Has hospital IT invested or plan to invest in Smartphones? 32

 Quantity. How many Smartphones has hospital IT purchased for mobile workers? 33

 Target audience. Which mobile workers are targeted for hospital-owned Smartphone usage? . 34

 Vendors. Which Smartphone vendor has hospital IT deployed? 35

 Bring Your Own Device (BYOD) Programs 41

 Program. Has hospital IT introduced a Bring Your Own Device (BYOD) program? 41

 Target audience. Which mobile workers can participate in the BYOD program?..... 42

 Unsecured SMS usage. Are nurses using personal Smartphones and SMS to support clinical communications?..... 45

COMMUNICATIONS PLATFORMS.....46

 3rd Party Smartphone-based Communications Platform 46

 Investments. Has hospital IT invested or plan to invest in a mobile communications platform?. 46

 Vendor. Which mobile communications platform has hospital IT deployed?..... 47

 Functionality. Which mobile communications platform functionality has been deployed? 48

 Scope. How widely deployed is the mobile communications platform?..... 54

 Middleware Integration 55



Investments. Has hospital IT invested in middleware? 55

Vendor. Which middleware vendor has hospital IT deployed? 56

Functionality. How is middleware being used to integrate with hospital legacy systems?..... 57

ELECTRONIC HEALTH RECORD (EHR) 61

Mobile EHR Clinical Applications 61

Investments. Has hospital IT invested or plan to invest in mobile EHR applications? 61

Vendor. Which mobile EHR applications has hospital IT deployed? 63

Mobile EHR Messaging Tools..... 64

Investments. Has hospital IT invested or plan to invest in mobile EHR messaging tools? 64

Vendor. Which mobile EHR messaging tools has hospital IT deployed? 67

COMMUNICATIONS INFRASTRUCTURE..... 68

Security..... 68

Are Smartphones adequately secured to protect patient health information? 68

Investments. Has hospital IT invested in a Mobile Device Management solution? 71

Vendors: Which mobile device management solution has hospital IT deployed?..... 72

Network Infrastructure 73

Is the quality of the hospital’s WLAN adequate to support mobile voice and data?..... 73

Analytics and Reporting 75

Is hospital IT using analytics to optimize communications usage and effectiveness? 75

OPERATIONAL CHALLENGES 77

Workflow Adaption..... 77

Are hospitals optimizing workflows to support clinical communications and collaboration?..... 77

End User Adoption..... 82

Are mobile workers adopting Smartphone-based communications platforms? 82

RECOMMENDATIONS..... 84

FUTURE OPPORTUNITIES 86

CONCLUSIONS 87

ABOUT SPYGLASS CONSULTING GROUP 88

APPENDIX A: LIST OF FIGURES 89

APPENDIX B: VENDORS COVERED IN REPORT..... 90

ENDNOTES 92

