Healthcare Without Bounds: Point of Care Computing for Physicians 2012

TITLE:	Healthcare Without Bounds: Point of Care Computing for Physicians 2012
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Study Overview:

Mobile computing solutions are poised to transform how physicians can deliver and practice medicine enabling them to access and aggregate patient information quickly, efficiently and securely from any location, at any time. These solutions can streamline physician productivity, enhance patient safety, and reduce the risk of medical errors.

Physicians are mobile professionals. There are approximately 650,000 physicians in the United States that control more than 80percent of the nation's healthcare spending through the delivery of patient services and referrals. They work in high-stress data intensive environments dominated by inefficient paper-based workflow processes. Physicians are under extreme time pressures and have a constant need to communicate with colleagues and access patient information as they travel between their offices, exam rooms and corridors of affiliated hospitals.

Physicians are embracing mobile computing devices. Physicians interviewed have embraced mobile computing devices to support their personal and professional workflows. Mobile device adoption is being driven by technology innovation including easy-to-use, low-cost, lightweight mobile devices, widespread cellular broadband availability (3G/4G), cloud-based ecosystem to support Internet-connected applications, and the emergence of location-based services.

Apple iPad's future is bright BUT it is not ready to transform patient care delivery. Eighty percent of physicians interviewed believe Apple iPad has a promising future in healthcare BUT are skeptical iPad is ready to transform patient care delivery TODAY. iPad is only one component of an overall end-to-end clinical solution. Software innovation will be required to realize the vision for anytime anywhere computing.

Physicians primarily using desktop computers to access patient data. Eighty-three percent of physicians interviewed were using desktop computers as their primary device for accessing corporate assets and patient data whether they were at the hospital, in their office, or at home. Physicians were found to be using mobile devices to access clinical information WHEN they were outside of their normal working environment.

Hospital IT is resistant to supporting personal devices on the corporate network. Seventy-five percent of physicians interviewed reported that hospital IT was resistant to supporting personal mobile devices on the corporate network. Hospital IT believes personal devices are insecure, less reliable, and more expensive to deploy, support and maintain than desktop computers.

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Study Methodology	**Point of Care Computing for Physicians 2012** presents the findings of an end-user market study focused on the current state of computing adoption by **physicians** across the United States. The report uncovers strong opinions regarding the market opportunities and challenges for adopting computing solutions at the point of care to streamline physician productivity, enhance patient safety, and reduce the risk of medical errors. **Point of Care Computing for Physicians 2012** is an outgrowth of a similar study published by Spyglass in October 2007 entitled **Point of Care Computing for Physicians**. Throughout this report, Spyglass will compare and contrast interesting trends identified across both studies. Content for **Point of Care Computing for Physicians 2012** was derived from more than 100 in-depth interviews with physicians working in acute care and ambulatory environments nationwide. Clinicians interviewed were technically competent and representative of a broad range of medical specialties and institution sizes. Spyglass conducted the telephone interviews over a four-month period beginning **July 2011**. The purpose of the interviews was to identify the needs and requirements for point of care computing through discussions about: • existing workflow inefficiencies in accessing clinical information, • current usage models for computing devices and solutions, and • barriers for widespread adoption. Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed point of care solutions.
TARGET AUDIENCE	• **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**

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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.

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