Healthcare without Bounds: Point of Care Communications for Nursing 2016

TITLE:	Healthcare without Bounds: Point of Care Communications for Nursing 2016
AUTHOR:	**Spyglass Consulting Group** Gregg Malkary, Managing Director gmalkary@spyglass-consulting.com www.spyglass-consulting.com
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STUDY OVERVIEW:	**Smartphones and mobile unified communications** are enabling nurses, physicians, ancillary workers, and medical support staff to streamline communications, improve team-based collaboration, and enhance care coordination across the healthcare continuum. The Joint Commission, the nation's predominant standards-setting and accrediting body, identified the primary root cause of more than 70 percent of treatment delays and sentinel events as being caused by a breakdown in communications. They also identified improved staff communications as a National Patient Safety Goal for hospitals in 2010.[1] [2] Nurses are the single largest healthcare professional group in the United States with 3.13 million registered members.[3] They are mobile professionals who are constantly on the go working in high-stress, data-intensive environments dominated by inefficient paper-based processes. They have a constant need for direct and immediate communications with colleagues and patients, as well as real-time access to relevant patient information at point of care. With the transition toward patient centered care models and value-based purchasing, leading hospitals surveyed are evaluating and making investments in Smartphones and mobile unified communications systems to help achieve the Triple AIM by improving care quality and outcomes, reducing healthcare delivery costs, and increasing patient and provider satisfaction. **Hospital IT investment priorities are pivoting toward mobile communications.** Seventy-one percent of hospitals surveyed regard mobile communications as an emerging investment priority driven by the adoptions of new patient centered care models and value-based purchasing. **Large-scale enterprise-wide deployments are focusing on the mobile hospital worker.** Thirty-eight percent of hospitals surveyed had invested in a Smartphone-based communications platform to support clinical communications with an average size deployment of 624 devices. Fifty-two percent of them have expanded their deployments beyond clinical messaging to support other mobile hospital workers. **Hospital IT anxious about growing cybersecurity threats.** Eighty-two percent of hospitals surveyed expressed grave concerns about their ability to support and protect mobile devices, patient data, and hospital's technology infrastructure as a result of the growing threat of cybersecurity attacks.

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STUDY METHODOLOGY	**Point of Care Communications for Nursing 2016** presents the findings of an end-user market study focused on the current state of mobile communications adoption by nurses across the United States. The report uncovers strong opinions regarding the market opportunities and challenges for hospitals and health systems who are considering large-scale deployments of Smartphones and mobile unified communications to help nurses, physicians, ancillary care workers, and medical support staff to streamline communications, improve team-based collaboration, and enhance care coordination across the healthcare continuum. **Point of Care Communications for Nursing 2016** is an outgrowth of a similar study published by Spyglass in March 2014 entitled Point of Care Communications for Nursing 2014. Content for Point of Care Communications for Nursing 2016 was derived from more than 100 in-depth interviews with IT and 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. The telephone interviews were conducted over a three-month period starting in March 2016. The purpose of the interviews was to identify the needs and requirements for communications at point of care through discussions about: • existing workflow inefficiencies in communicating with care team members, • current usage models for mobile communications devices and solutions, and • barriers for widespread mobile communications adoption. Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these 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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Gregg Malkary
gmalkary@spyglass-consulting.com

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.

[1] Joint Commission, Improving America's Hospitals, Annual Report on Safety and Quality, 2007
[2] Joint Commission, Sentinel Event Data, Root Causes by Event Type, 2012
[3] Kaiser Family Foundation, Total Number of Professionally Active Nurses, 2016, http://kff.org/other/state-indicator/total-registered-nurses

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Gregg Malkary
gmalkary@spyglass-consulting.com

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Spyglass Consulting Group
Gregg Malkary, Managing Director
Menlo Park, CA

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