Healthcare without Bounds: Point of Care Communications for Nursing

TITLE:	Healthcare without Bounds: Point of Care Communications for Nursing
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INTRODUCTION	**Point of Care Communications for Nursing** presents the findings of an end-user market study focused on the current state of communications adoption by **nurses** across the United States. The report uncovers strong opinions regarding the market opportunities and challenges for adopting solutions at point of care to improve communications and collaboration, streamline nursing productivity, and enhance patient care and safety. **Point of Care Communications for Nursing** is an outgrowth of a similar study published by Spyglass in November 2006 entitled **Trends in Mobile Communications**. Content for **Point of Care Communications for Nursing** was derived more than 100 in-depth interviews with nurses working in **acute care** and **home health** nursing environments nationwide. Nurses interviewed were technically competent and representative of a broad range of nursing specialties, organization types, and organization sizes. The telephone interviews were conducted over a three-month period starting in June 2009. 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 colleagues and patients, • 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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ABSTRACT:

Mobile communications solutions used at **point of care** are poised to revolutionize the way nurses practice and deliver patient care enabling them to communicate and collaborate with colleagues, physicians, ancillary workers and patients regardless of their physical location.

Nurses are the single largest healthcare professional group in the United States with 2.9 million registered members. 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.

Patients are sicker today with more physical and cognitive impairments than a decade ago. They require complex medical care involving multiple medical specialties. With the current nursing shortage, nurses are taking care of more patients who are staying for shorter periods. They are under pressure to coordinate, communicate and document patient care more effectively across a wider array of care team members.

Nurses are using with a variety of mobile devices including pagers, cell phones, Smartphones, and VoIP phones to improve communications, streamline productivity and enhance patient care and safety.

Hospital communications solutions are anything but unified. Hospitals have purchased incompatible departmental systems from different vendors using different handsets operating over different wireless frequencies. Nurses are forced to carry multiple communications devices to address specific job functions and responsibilities. Critical messages, non-critical messages and spam are frequently interspersed on the same or different devices making it difficult to filter, manage and prioritize communications from team members.

Wireless networks not optimized to support nurses at point of care. Networks were poorly designed resulting in coverage gaps, wireless interference, and overloaded access points. Frequent dropped data and voice connections make it difficult for nurses to document patient care at the bedside or use VoIP handsets to communicate with team members.

Hospitals are investing in point of care communications BUT deployments are limited. Cost considerations have focused deployments on specific hospital departments and limited distribution of VoIP handsets to key nursing personnel.

VoIP communications can be disruptive at point of care for nurses receiving incoming calls from team members while performing a patient procedure or treatment. Interrupting a nurse's train of thought can easily introduce medical errors into the patient care process.

Point of care deployments require nursing involvement during the design phases of an IT project. Hospital IT must collaborate with nursing staff to understand existing workflow inefficiencies and how wireless communications and mobile computing technology can be used to support new and existing processes at point of care.

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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 120 leading high technology vendors, management consulting organizations and healthcare providers including **Cisco, IBM, Microsoft, Intel, Hewlett Packard, Oracle, Johnson & Johnson, Pfizer, Siemens, GE Healthcare, Philips Healthcare, 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.

Customer Testimonials	I have known Gregg for 5 years. Within my healthcare practice charter at NEC, I have engaged the Spyglass Consulting Group on many occasions. Gregg is very well respected in the healthcare industry and maintains a very broad audience within the provider community. Coupled with his own industry insight and personalized research methodology; he produces extremely straight-forward, actionable industry analysis. Gregg always has a pulse on the most relevant and emerging technology trends around clinical communications, computing and other advanced technologies. I have utilized his research to scope and target vertical sales training, validate market positioning and expand my own industry knowledge and insight. I have also worked with Gregg to deliver corporate sales presentations at NEC national sales events that have been very well received. I have enjoyed and gained from our collaboration over the years. Investing even 5 minutes in dialogue with Gregg generates take-a-way value.

Lance Mehaffey, Director of Healthcare Markets
NEC Unified Solutions

Trends in RFID is an impressive and useful analysis of the current state of RFID technologies and solutions in healthcare. Its value to me and other hospital and health systems CIOs comes from the survey of operating managers and its analysis of opportunities for specific departments. Given our construction project and network infrastructure upgrades, the timing of the report's publication could not be better. Creative CIOs of leading organizations will gain many useful insights from the report as they consider investments in RFID solutions targeted to patient safety and operational quality improvements.

Walter Fahey, VP and CIO
Maimonides Medical Center
Brooklyn, NY

Spyglass Consulting Group has provided the Cisco Healthcare Team with excellent, in-depth market research and analysis that clearly maps key healthcare related issues/trends to available mobile technologies and solutions. Spyglass has also been a key resource for Cisco's healthcare channel partners with educational sessions providing partners with detailed and meaningful insights about healthcare customer requirements. Spyglass engagements with Cisco and Cisco partners have been extremely professional and have provided excellent value-add. I strongly believe Spyglass' research could be useful for healthcare provider organizations and solutions vendors targeting healthcare industry.

Kacey Carpenter, Healthcare Solutions Marketing
Cisco Systems

Spyglass Consulting Group's reports on technologies in healthcare are an absolute necessity to anyone in this business. I have learnt a terrific amount from his reports, Trends in Remote Patient Monitoring and Trends in RFID, and I refer to them constantly. The information that is provided is sufficient and succinct to provide the support for establishing our strategies. The reports are not a massive collection of everything to know about these topics, but rather a practical collection of the most relevant information with important directions for my group which is focusing on a new direction for Pfizer. These documents are wonderful and practical resources.

David Lester, PhD
Director, Pfizer Human Health Technologies
Pfizer, Inc.

Trends in Mobile Computing is an excellent review. People of your caliber should be recognized at national meetings for your valuable contribution of legitimate end-user based research, so we can all better understand the market realities of mobile technology in healthcare. Your findings are both encouraging to those trying to advance the usage of mobile technologies, and words of caution to those who extrapolate or make assumptions solely based on anecdotal success stories.

Andrew Barbash, MD, **Chief of Neurology**
Holycross Hospital (Silver Spring, MD)

Gregg Malkary is a leader in healthcare IT consulting. He has built an international reputation making Spyglass Consulting a leading market intelligence firm. His unique ability to identify key trends and current issues relevant to businesses, clinicians, educators and regulatory agencies is particularly impressive. Gregg's detailed, investigative analyses offer expert information, which enables clients to make better industry decisions. His wide network of contacts ensures that his reports are thorough, well balanced and on the cutting edge.

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