Healthcare without Bounds: Point of Care Communications for Physicians 2014

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STUDY OVERVIEW:

Physician Smartphone adoption is nearly universal. Ninety-six percent of physicians interviewed report using Smartphones as their primary communications device to support clinical communications. They prefer the Smartphone because it is easier to use and provides more enhanced functionality than outdated communication options provided by hospital IT including pagers, overhead paging systems, landline phones and fax machines.

Efficient communications and collaboration between physicians, specialists, nurses and care team members is critical to enhance patient safety, and support the coordination and delivery of patient care across health settings. Joint Commission, in 2013, identified the primary root cause of more than 70 percent of treatment delays and sentinel events was caused by a breakdown in communications.[1] [2] Ponemon Institute, in July 2014, quantified the impact of paging systems and other antiquated communications technologies on healthcare delivery. Inefficient communications during critical clinical workflows costs the average U.S. hospital approximately $1.75 million annually.[3]

Hospital IT has an imperative to evaluate mobile devices and unified communications solutions to support collaborative team-based care and address regulatory requirements introduced by the Affordable Care Act including readmissions penalties, patient centered care models, and pay for performance. Next generation communications solutions must be secure, easy-to-use, and tightly integrated with the EHR to provide adequate clinical context to close the communications loop with colleagues and team members.

Hospital IT paying lip service to support physician mobility. While hospital IT has made significant technical infrastructure improvements, many physicians interviewed find they are only paying lip service to support physician mobility due to limited planned investments, poor mobile EHR tools, and inadequate mobile user support.

Physicians are resistant to use EHR for clinical communications. Eighty-three percent of physicians interviewed expressed frustration with using the EHR to support clinical communications due to poor EHR interoperability, limited EHR messaging capabilities, and poor usability that makes it difficult to find relevant clinical data.

Physicians face obstacles to support collaborative care. Majority of physicians interviewed report that they lacked the financial incentives, tools, and processes to support collaborative team-based care.

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STUDY METHODOLOGY	**Point of Care Communications for Physicians 2014** presents the findings of an end-user market study focused on the current state of communications adoption by **physicians** across the United States. The report uncovers strong opinions regarding the market opportunities and challenges for adopting mobile solutions to enhance communications and collaboration, streamline physician productivity, improve patient care quality and safety, and increase physician satisfaction. **Point of Care Communications for Physicians 2014** is an outgrowth of a similar study published by Spyglass in July 2010 entitled Point of Care Communications for Physicians 2010. Content for **Point of Care Communications for Physicians 2014** was derived from more than 100 in-depth interviews with physicians working in hospital-based and ambulatory environments nationwide. Providers interviewed were 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 May 2014. The purpose of the interviews was to identify the needs and requirements for communications at point of care through discussions about: • workflow inefficiencies in communicating with care team members, • usage models for mobile devices and solutions, and • barriers for widespread mobile 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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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] Ponemon Institute, The Imprivata Report on the Economic Impact of Inefficient Communications in Healthcare, July 2014

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POC Communications for Physicians 2014

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