Healthcare without Bounds: Trends in Digital Patient Engagement 2017	
TITLE:	Healthcare without Bounds: Trends in Digital Patient Engagement 2017
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STUDY OVERVIEW:	**Digital patient engagement tools** are poised to transform the way patients and family members are engaged, educated, and empowered to take a more active role in managing their health across the care continuum within hospitals, ambulatory environments, clinics, physician offices, and even at home. According to the Robert Wood Johnson Foundation, a growing body of evidence suggests that patients who are more engaged in their healthcare have better health outcomes, experience fewer complications, and lower costs compared to patients who are less involved.[1] Hospital investments in digital engagement tools are being driven by several provisions with the Affordable Care Act including the Meaningful Use Program, various value-based care programs, Hospital Readmission Reduction Program, and HCAHPS Patient Satisfaction Survey. With the transition toward patient and family centered care models and the adoption of various at-risk reimbursement models, hospitals surveyed are evaluating next generation digital engagement tools to help achieve the Triple AIM by helping reduce healthcare costs, improve care quality and outcomes, and increase patient and provider satisfaction. **Hospitals are making significant digital engagement tools investments.** Eighty-nine percent of hospitals surveyed have invested and 90 percent are planning incremental investments in digital engagement tools including EHR-based patient portals and TV-based interactive patient systems. **Hospitals are targeting chronically ill patients.** Eighty-nine percent of hospitals surveyed report that future investments focus on integrating digital engagement tools with evidence-based pathways and care management programs to support chronically ill patients with CHF, COPD, diabetes, asthma, cancer and stroke. **Hospitals are exploring collaboration opportunities with payers.** Forty-nine percent of hospitals surveyed were exploring collaboration opportunities with CMS and other 3rd party payers to subsidize patient engagement initiatives associated with value-based care programs. **Hospitals are facing challenges to support widespread deployments** including low end-user adoption, poorly defined requirements, and lack of evidence demonstrating clinical efficacy.

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STUDY METHODOLOGY	**Trends in Digital Patient Engagement** presents the findings of an end-user market study focused on the digital engagement tool usage and adoption by hospital-based patients and clinical staff across the United States. Content for **Trends in Digital Patient Engagement** 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. The telephone interviews were conducted over a three-month period starting in January 2017. During the interviews, Spyglass identified: • clinical process gaps for engaging patients and family members within the care process, • current digital engagement tool usage models, • barriers for widespread digital engagement tool adoption during hospitalization, and • challenges for integrating digital engagement tools with existing evidence-based pathways and care management programs. 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] Robert Wood Johnson Foundation, Health Policy Brief, Feb 14, 2013

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Trends in Digital Patient Engagement
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