

Healthcare without Bounds: Trends in Remote Patient Monitoring 2013	
TITLE:	Healthcare without Bounds: Trends in Remote Patient Monitoring 2013
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STUDY OVERVIEW:	<p>Remote Patient Monitoring (RPM) solutions enable healthcare organizations to remotely monitor and manage patients with chronic conditions such as congestive heart failure, chronic obstructive pulmonary disease, diabetes and asthma. RPM has been demonstrated to significantly improve patient outcomes and reduce healthcare delivery costs enabling healthcare providers to identify patients before their condition(s) become more acute requiring re-hospitalization and/or unnecessary trips to the emergency department.</p> <p>RPM early adopters have been capitated managed care organizations with fiscal responsibility for their patients across the continuum of care. These organizations include health maintenance organizations, integrated delivery systems, home health agencies, hospices, disease management companies and government agencies like the Department of Veteran's Affairs.</p> <p>RPM market adoption is now poised for robust growth by healthcare provider organizations with the emergence of accountable care. Fifty-five percent of hospitals and health systems interviewed have deployed or are evaluating RPM technology to address stringent penalties focused on excessive hospital readmissions of Medicare patients, value-based financial incentives, and new patient centered care models.</p> <p>Accountable Care Organizations face significant RPM integration challenges. Fifty-eight percent of hospitals and health systems interviewed expressed concerns about RPM integration with existing care processes and clinical information systems.</p> <p>RPM efficacy remains a controversial topic within healthcare industry. More than 50 percent of hospitals and healthcare systems interviewed questioned the clinical efficacy of RPM technology and their anticipated financial return on investment.</p>

<p>STUDY METHODOLOGY</p>	<p>Trends in Remote Patient Monitoring 2013 (RPM) presents the findings of an end-user market study focused on the current state of remote patient monitoring adoption by healthcare provider organizations across the United States. The report uncovers strong opinions regarding the market opportunities and challenges for deploying RPM solutions to control healthcare delivery costs, improve patient outcomes and increase patient access to care.</p> <p>Trends in Remote Patient Monitoring 2013 is an outgrowth of a similar study published by Spyglass in March 2009 entitled Trends in Remote Patient Monitoring 2009. Throughout this report, Spyglass traces remote patient monitoring over the past few years identifying important trends in the field.</p> <p>The content for Trends in Remote Patient Monitoring 2013 was derived from more than 100 in-depth interviews with healthcare organizations involved in telehealth/telemedicine including home health agencies, standalone community hospitals, multi-hospital delivery systems, government agencies and payers.</p> <p>Telephone interviews were conducted over a two-month period starting in March 2013. The purpose of the interviews was to identify the needs and requirements for remote patient monitoring through discussions about existing workflow inefficiencies in managing chronically ill patients, current telehealth/telemedicine initiatives, and potential impact for deploying remote patient monitoring in the future.</p> <p>Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these solutions.</p>
<p>TARGET AUDIENCE</p>	<ul style="list-style-type: none"> • 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

**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.

Trends in Remote Patient Monitoring 2013

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