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## **SPYGLASS CONSULTING STUDY FINDS TABLETPC GAINING TRACTION WITH OUTPATIENT PHYSICIANS**

*77 Percent of Outpatient Physicians Report TabletPC is a Suitable Mobile Computing Device for Accessing Multi-Function Clinical Applications*

**MENLO PARK, CA, January 12, 2005.** Spyglass Consulting Group, a market intelligence firm and consultancy, today announced the results of a comprehensive market study focused on mobile computing usage trends amongst physicians in the healthcare industry. Spyglass interviewed over 100 outpatient and hospital-based physicians across the United States to better understand how they are using mobile computing solutions at the point of care to view reference materials, access clinical patient data, solve existing workflow inefficiencies and capture patient billing charges.

Spyglass found 77 percent of outpatient physicians, working in office and clinic environments, believed TabletPC was a suitable mobile computing device for accessing multi-function clinical applications at the point of care. These applications enable outpatient physicians to access patient electronic medical records, generate structured patient documentation, initiate medical orders, view radiological images and capture patient billing charges.

### **PHYSICIANS WORK UNDER SIGNIFICANT PRESSURE**

“There are over 640,000 physicians in the United States that control over 80 percent of the nation’s healthcare spending through the delivery of patient services and referrals. Physicians work in high stress, high risk and data intensive environments that are dominated by paper-based processes and inefficient workflows. Physicians are mobile professionals that are under extreme time pressures and have a constant need to access clinical patient information as they travel between exam rooms, hospitals and their offices,” according to **Gregg Malkary, Managing Director** of the Spyglass Consulting Group.

### **MOBILE DEVICES ARE THE STETHOSCOPES OF THE 21<sup>ST</sup> CENTURY**

Physicians nationwide are independently purchasing mobile devices with standalone clinical solutions to retrieve accurate, up to date information to help diagnose illnesses, determine treatment protocols and prescribe medications. Physicians are using a number of different mobile devices including PDAs, Smartphones and TabletPCs.

### **NO IDEAL MOBILE COMPUTING DEVICE**

Healthcare organizations are finding out first hand that there is no ideal mobile computing device. The right device is dependent upon the healthcare environment, the task to be performed, the complexity of the applications, and physician’s personal preferences. Successful mobile solutions are well integrated with physician workflow and environmental ergonomics.

## SIGNIFICANT CHALLENGES EXIST FOR WIDESPREAD DEPLOYMENT

Mobile computing usage faces a significant number of obstacles to widespread adoption within healthcare environments as the applications become more comprehensive requiring increased integration with existing legacy-based systems. According to hospital administrators interviewed these obstacles including physician adoption, funding and protection of patient information on handheld devices.

## OTHER KEY ISSUES ADDRESSED IN THIS STUDY

- Which mobile solutions are physicians using today? Which solutions do physicians anticipate using over the next 12 to 18 months?
- Why are hospital-based physicians resistant to using TabletPC?
- Do mobile computing devices pose infection control risks at the point of care?
- Are speech and handwriting recognition usable technologies that are ready for mainstream physician adoption?
- Are healthcare IT vendors delivering quality products to help automate physician workflow?

## ABOUT SPYGLASS MOBILE COMPUTING STUDY

**Spyglass'** current research, **Healthcare without Bounds**, focuses on the current and future potential of mobile computing and wireless technologies within the healthcare industry.

With **Mobile Computing for Physicians**, Spyglass is now publishing its third study that provides valuable insights and perspectives on how *physicians* are using mobile computing solutions at the point of care to view reference materials, access clinical patient data, solve existing workflow inefficiencies and capture patient billing charges. The study uncovers strong opinions regarding the market opportunities and challenges for deploying mobile nursing solutions within healthcare organizations today.

The content for **Mobile Computing for Physicians** was derived from over 100 in-depth interviews with outpatient and hospital-based physicians across the United States. Physicians interviewed were predominately technology savvy and were representative of a broad range of medical specialties and institution sizes.

The telephone interviews were conducted over a 3-month period starting in September 2004. The purpose of the interviews was to identify their critical needs and requirements through discussions about existing workflow inefficiencies, usage of mobile devices and clinical applications today, and opportunities for mobile computing solutions in the future.

This market study is targeted at:

- **Software & hardware vendors, systems integrators and management consultants** who are selling mobile computing devices, applications and services into the healthcare industry.
- **Hospital administrators & IT executives** who are making strategic decisions to fund clinical information technology solutions including mobile computing.
- **Clinicians** who are involved in informatics and clinical system evaluation and selection.
- **Investment banking and private equity investing professionals**

The complete market study "**Healthcare without Bounds: Mobile Computing for Physicians**," is available for \$1,995 (USD) from the Spyglass Consulting Group website:

<http://www.spyglass-consulting.com>

## ABOUT SPYGLASS CONSULTING GROUP



The **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 & market intelligence, strategic partnership development, product marketing and investment due diligence.

Spyglass customers include leading high technology vendors such as **IBM, McKesson, Cerner, Philips Medical, Cardinal Health, Sprint, NEC, Palm, RIM, Symantec, Sybase iAnywhere, Citrix, Foundry Networks, PriceWaterhouseCoopers, and Cap Gemini.**

**Mr. Gregg Malkary** is the **founder** and **Managing Director** of the **Spyglass Consulting Group**. He has over 20 years experience in the high technology industry working with Fortune 2000 companies to help them use information technology for competitive advantage. Mr. Malkary has domain expertise in mobile computing, wireless and broadband technologies with direct experience in the healthcare, government, manufacturing, communications and entertainment markets.

Prior to founding **Spyglass Consulting Group** in August 2002, Mr. Malkary was an Associate Partner at **Outlook Ventures**, a venture capital firm that focuses on early stage investments in enterprise software and communications companies. Mr. 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, SkyTel Communications and Exodus Communications.**

Mr. Malkary is a frequent speaker at regional and national conferences focused on mobile computing, wireless technologies and healthcare related issues. He has been written about and quoted in numerous industry publications such as Network World, eWeek, Wireless Week, MIT Technology Review, Health Data Management, Modern Physician, Health Management Technology, Healthcare IT News and ADVANCE for Health Information Executives.

Mr. 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 computer science.

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