
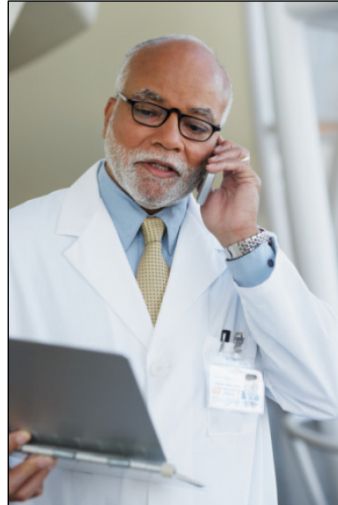


Healthcare without Bounds: Point of Care Communications for Physicians	
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INTRODUCTION	<p>Point of Care Communications for Physicians presents the findings of an end-user market study focused on how physicians across the United States are rapidly adopting mobile communications at point of care to improve communications and collaboration, streamline productivity, and enhance patient care and safety.</p> <p>Point of Care Communications for Physicians is an outgrowth of a similar study published by Spyglass in November 2006 entitled Trends in Mobile Communications. Throughout this report, Spyglass will compare and contrast interesting trends identified across both studies.</p> <p>Content for Point of Care Communications for Physicians was derived from more than 100 in-depth interviews with physicians working in acute care and ambulatory environments nationwide. Physicians interviewed were technically competent and representative of a broad range of medical specialties, organization types, and organization sizes.</p> <p>The telephone interviews were conducted over a three-month period starting in February 2010. The purpose of the interviews was to identify the needs and requirements for mobile communications at point of care through discussions about:</p> <ul style="list-style-type: none"> • existing workflow inefficiencies in communicating with colleagues, care team members, and patients, • current usage models for mobile communications devices and solutions, and • barriers for widespread mobile communications adoption. <p>Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these solutions.</p>
TARGET AUDIENCE	<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

ABSTRACT:



Mobile communications are poised to revolutionize the way physicians can communicate with colleagues, care team members, and patients to improve collaboration, streamline productivity, and enhance patient care and safety. With these mobile solutions, physicians can:

- communicate via voice, text messaging and e-mail,
- determine care team member availability and status,
- access hospital directory services, and
- review patient information.

There are more than 650,000 physicians in the United States. Many of them are mobile professionals who are constantly on the go as they travel between their offices, clinics, exam rooms, and corridors of affiliated hospitals. They work in high-stress data intensive environments dominated by inefficient paper-based workflow processes where they have a constant need to communicate with colleagues and to access relevant patient information regardless of their physical location. As physicians are taking care of more patients with higher acuity levels, it is becoming increasingly difficult to communicate with them in a timely manner.

Physicians experiencing difficulties connecting with colleagues. Seventy-eight percent of physicians interviewed were experiencing difficulties accessing and communicating with colleagues in a timely manner. Physicians are busy mobile professionals who are constantly on the go and are not always available when they are needed. Physicians also lack financial incentives to be more accessible because the current fee-for-service reimbursement system encourages physicians to focus on the quantity vs. the quality of healthcare delivered. Non-essential phone or e-mail communications with colleagues and patients are seen as non-reimbursable distractions.

Physician smartphone adoption experiencing significant growth. Ninety-four percent of physicians interviewed were using smartphones to communicate, manage personal/business workflows, and access information including medical reference materials. Physician smartphone adoption is occurring more rapidly than with the general public which is evidenced by a recent AT&T announcement reporting 42 percent of their subscribers were using smartphones. Forty-four percent of physicians interviewed using smartphones had adopted the Apple iPhone followed by 25 percent who had adopted the RIM Blackberry.

Physicians overwhelmed by the volume of incoming communications. Physicians interviewed report they are overwhelmed by the daily volume of communications received from colleagues, care team members, and patients. They lack automated tools to manage voice mail, pager messages, SMS messages, and electronic mail. They are forced to continually check separate data silos and manually filter and prioritize communications based upon sender, subject and priority. Critical communications easily fall through the cracks.

Physicians lack standardized processes to coordinate patient care. Fifty-six percent of physicians interviewed were concerned about lack of standardized processes for transitioning care between colleagues. Patient hand off process used by hospital-based physicians and the patient referral process used by community-based physicians are informal and ad hoc which can introduce medical errors into the patient care process.

**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, 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.

<p>Customer Testimonials</p>	<p>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.</p> <p>Lance Mehaffey, Director of Healthcare Markets NEC Unified Solutions</p> <p>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.</p> <p>Walter Fahey, VP and CIO Maimonides Medical Center Brooklyn, NY</p> <p>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.</p> <p>Kacey Carpenter, Healthcare Solutions Marketing Cisco Systems</p> <p>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.</p> <p>David Lester, PhD Director, Pfizer Human Health Technologies Pfizer, Inc.</p> <p>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.</p> <p>Andrew Barbash, MD, Chief of Neurology Hollywood Hospital (Silver Spring, MD)</p> <p>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.</p> <p>Brenda Hage, PhD, CRNP Director of Graduate Nursing Programs, Department Of Nursing Misericordia University (Wilkes-Barre, PA)</p>
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Point of Care Communications for Physicians July 2010

Spyglass Consulting Group
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