


<b>Healthcare without Bounds: Trends in Clinical Communications &amp; Collaboration 2021</b>	
<b>TITLE:</b>	Trends in Clinical Communications & Collaboration 2021
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<b>PRICE</b>	\$2,795.00 (US) <i>Enterprise pricing available upon request</i>
<b>STUDY OVERVIEW:</b>	<p>Hospitals and health systems surveyed have made significant enterprise-wide investments in <b>Smartphones</b> and <b>Clinical Communications and Collaboration (CCC) solutions</b> to drive clinical transformation and address the mission- and patient-critical communications, collaboration, and care coordination requirements of patient care teams, medical support staff, and non-clinical mobile workers within the hospital and across the care continuum.</p> <p>During the COVID-19 pandemic, healthcare provider interest and focus on CCC solutions was strong. Many expanded existing CCC deployments to address the communications, collaboration, coordination, and documentation requirements of essential frontline workers, medical staff, and ad hoc care teams across the care continuum who were responsible for monitoring and managing contagious and sometimes severely ill COVID-19 patients.</p> <ul style="list-style-type: none"> <li>• <b>Adapted mobile communications strategies.</b> Providers adapted their mobile communications strategies to address the business, clinical, and operational realities of the pandemic. They optimized their business operations, streamlined clinical workflows, increased staff productivity, and improved staff/patient experience.</li> <li>• <b>Expanded usage of alarm management and clinical surveillance.</b> Providers expanded their usage of alarm management and clinical surveillance tools. This helped frontline workers identify, monitor and manage patients considered at-risk of deteriorating or life-threatening conditions, especially when taking care of patients who are on ventilators.</li> <li>• <b>Leveraged Telehealth and other digital health tools.</b> Providers leveraged Telehealth and other digital health tools to enhance patient/provider communications and encourage patient self-sufficiency as a proxy for not being able to see their primary care provider or medical specialist.</li> <li>• <b>Realized value of hands-free communications.</b> Providers realized the value of hands-free communications devices powered by speech recognition. These devices enabled frontline workers, who were fully gloved, gowned, and masked, to use their devices without having to leave the room or take off their personal protective equipment to communicate and collaborate with colleagues, care team members, and medical staff.</li> <li>• <b>Enhanced enterprise-wide contacts directories.</b> Providers enhanced their enterprise-wide contact directories to include representatives from public health authorities, diagnostic laboratories, local hospitals, and community-based resources.</li> </ul>

<p><b>STUDY METHODOLOGY</b></p>	<p><b>Trends in Clinical Communications &amp; Collaboration</b> presents the findings of an end-user market study identifying the market opportunities and challenges for US-based hospitals and health systems who are evaluating large-scale investments in Smartphones and secure Clinical Communications and Collaboration solutions to address the mission- and patient-critical communications requirements of clinical and non-clinical mobile workers within the hospital and across the care continuum.</p> <p>Content for <b>Trends in Clinical Communications &amp; Collaboration</b> 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.</p> <p>The telephone interviews were conducted over a three-month period starting in June 2020. During the interviews, Spyglass identified the market requirements for Smartphones and secure Clinical Communications &amp; Collaboration solutions through discussions about:</p> <ul style="list-style-type: none"> <li>• workflow inefficiencies in communicating with care team members and patients,</li> <li>• current usage models for Smartphones and mobile communications solutions, and</li> <li>• barriers for widespread mobile communications adoption.</li> </ul> <p>Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these solutions.</p>
<p><b>TARGET AUDIENCE</b></p>	<ul style="list-style-type: none"> <li>• <b>Software and hardware vendors, systems integrators and management consulting groups</b> who are selling hardware, applications and services into the healthcare industry</li> <li>• <b>Healthcare administrators and IT executives</b> who are making strategic decisions to fund clinical information technology solutions</li> <li>• <b>Clinicians</b> who are involved in informatics and clinical system evaluation and selection</li> <li>• <b>Investment banking and private equity investors</b></li> </ul>

**ABOUT SPYGLASS  
CONSULTING  
GROUP**

**Spyglass Consulting Group** is a market advisory firm focused on disruptive technologies, changing business models, and growth opportunities within the healthcare and life sciences industries.

**Gregg Malkary** is the **Founder and Managing Director** of Spyglass. With more than 30 years of strategic planning, marketing, and business development experience, he is a nationally recognized leader in digital and clinical transformation helping its clients create, protect, and transform business value to support executive decision making, drive innovation, and enable sustainable competitive advantage.

Spyglass offers its clients market leading portfolio methodologies, tools, and services in the following growth areas:

- Evaluating disruptive technologies
- Transitioning to value-based care and population health management
- Embracing consumerism and digital health
- Improving operational performance through analytics
- Optimizing clinical workflows and EHR systems

Spyglass clients include leading technology companies, management consulting firms, healthcare provider organizations, and the investment community which includes **Cisco, IBM, Microsoft, Intel, Accenture, Hewlett Packard, GE Healthcare, Philips Healthcare, Kaiser Permanente, and Johns Hopkins.**

Prior to founding Spyglass Consulting Group in August 2002, Malkary was an Associate Partner at Outlook Ventures, a venture capital firm that focuses 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, SkyTel Communications and Liberate Technologies.

Malkary often speaks at regional and national conferences focused on mobile computing, wireless technologies, and healthcare-related issues. He has been written about and quoted in many industry publications including the Wall Street Journal, CIO, Business 2.0, MIT Technology Review, Network World and eWeek.

Malkary graduated with honors from Brown University where he earned a MS and BA in Computer Science. He was also awarded the prestigious North American Philips Corporation Fellowship for his graduate research work in graphical simulation environments.

For more information about this study, please contact Gregg Malkary at [gmalkary@spyglass-consulting.com](mailto:gmalkary@spyglass-consulting.com).

# Trends in Clinical Communications & Collaboration

## January 2021

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