HEALTHCARE TRENDS IN NORTH AMERICA
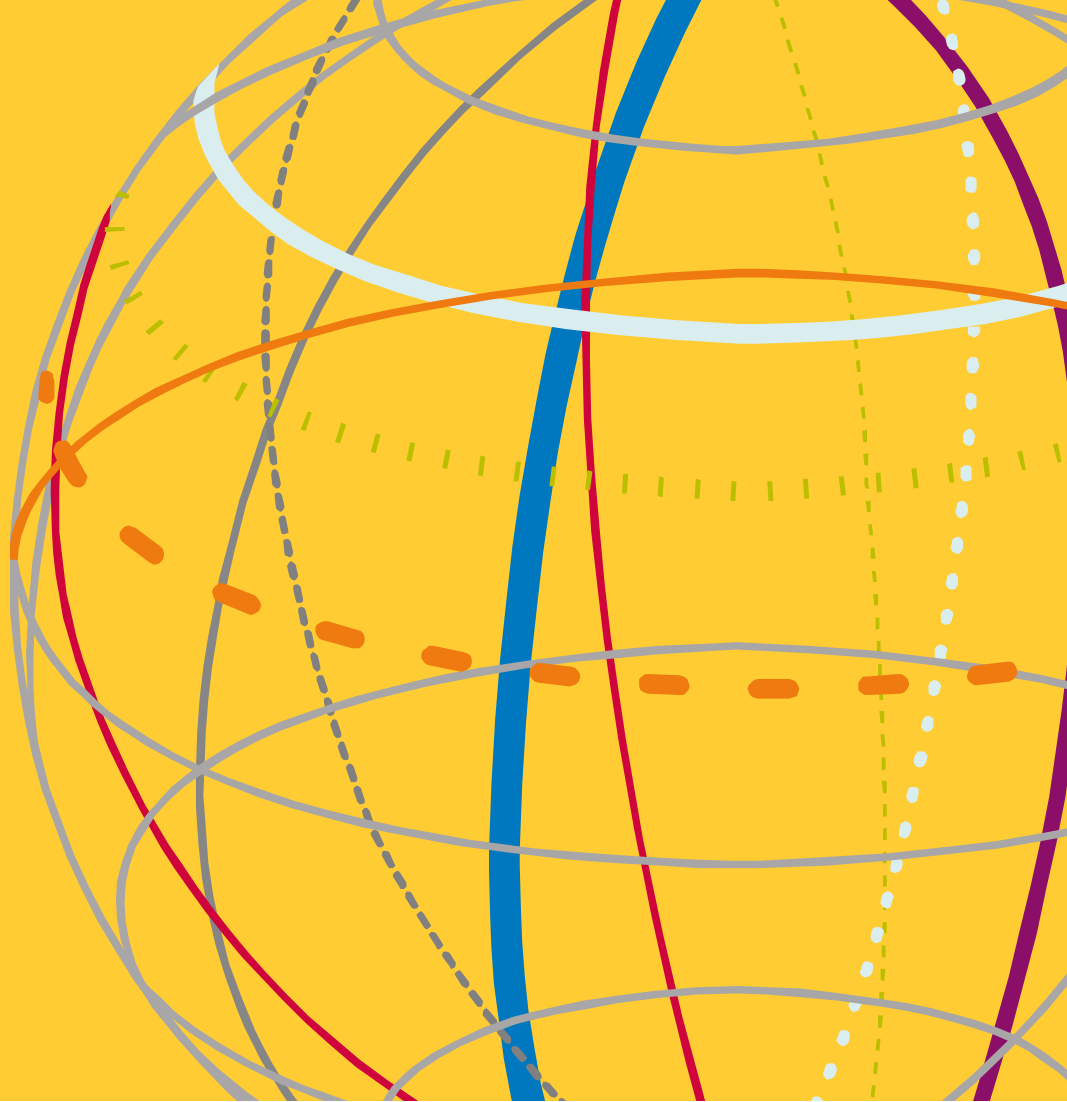
ANDY TIPPET
SR. MARKETING MANAGER
HEALTHCARE , AMERICAS

ScanSource Smart VAR Conference
August 21, 2014

ZEBRA TECHNOLOGIES

SEE MORE. DO MORE.

GOALS

- Discuss trends that are driving healthcare today
  - Advent of the EHR
  - Care across the continuum
  - Advent of Analytics
  - Issues around staff productivity
- Where AIDC fits
- What it takes to succeed

Fun Healthcare Facts

HEALTHCARE FACTOID

- Everyone has a unique tongue print!

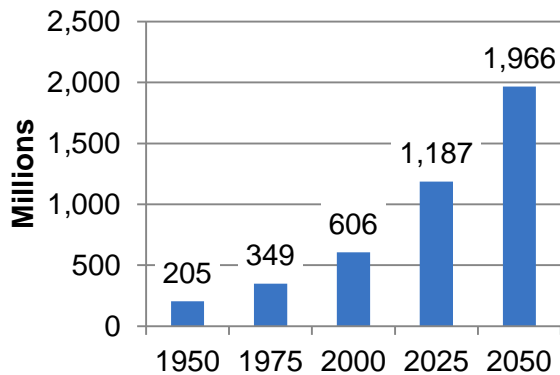# HEALTHCARE IN THE PAST

Injury

Acute disease

Population Disease
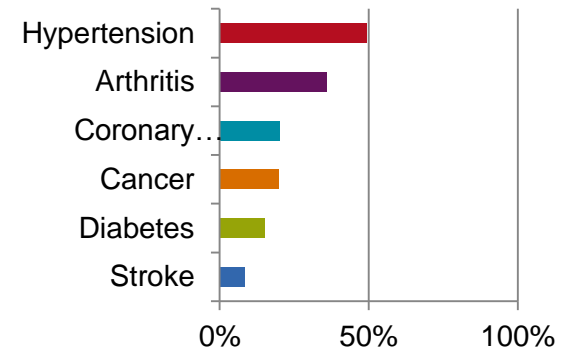
NEW ORDER - WORLD HEALTH DRIVERS

Aging Population – Worldwide Population>65

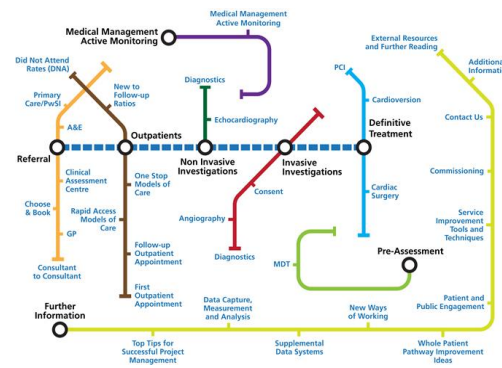## Decreasing Population Fitness

Prevalence of Chronic Disease

Lifestyle Diseases

- Asthma
- Cancer
- Cirrhosis
- COPD
- Type 2 Diabetes
- Heart Disease

- Metabolic Disease
- Osteoporosis
- Renal Failure
- Stroke
- Depression
- Obesity
- STD

Increasing Patient Complexity
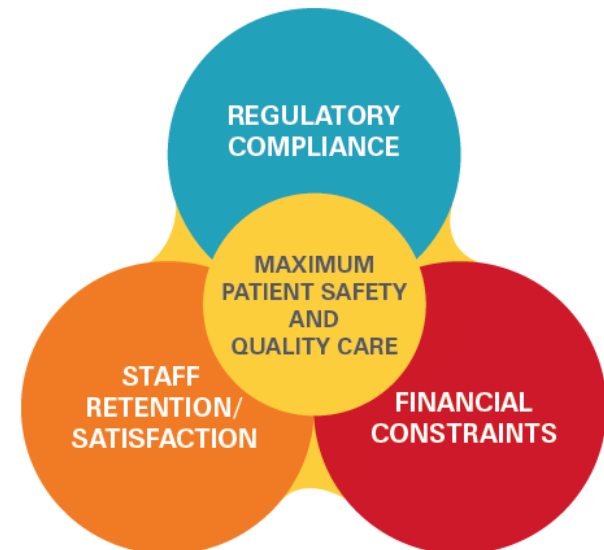
Increased Cost of Care
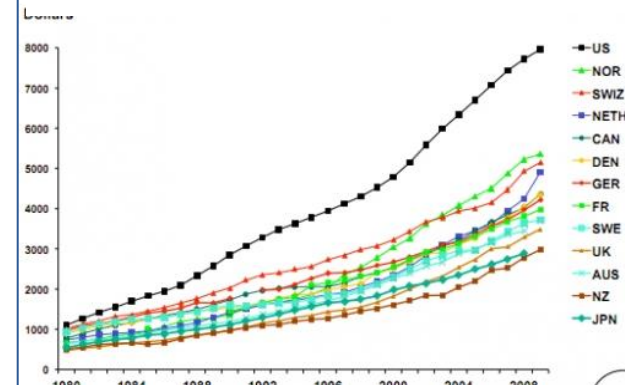
WHAT DO THESE CHANGES MEAN?

- It is important to treat the history of the person – enabled by the Electronic Health Record (EHR)

- Treatment is conducted throughout the life cycle – called the healthcare continuum

EHRS

- Enabler that support macro trends -
  – Movement from acute (injury) to chronic care (hypertension, diabetes)
  – Movement from Population to Individual care and back again
  – Function across continuum in acute and other areas

- Implementation in US supported by the HITECH ACT of 2009

- Over $10 billion has been distributed

REGULATORY COMPLIANCE

MAXIMUM PATIENT SAFETY AND QUALITY CARE

STAFF RETENTION/ SATISFACTION

FINANCIAL CONSTRAINTS

RELATIONSHIPS WITH KEY EHR PROVIDERS

- EHR Providers

- Additional Healthcare ISVs

HEALTHCARE FACTOID

The human head is one-quarter of our total length at birth but only one-eighth of our total length by the time we reach adulthood.

U.S. EMR ADOPTION STATUS - HIMSS

| Stage	Cumulative Capabilities	2011 Q4	Number of Hospitals
Stage 7	Complete EMR; CCD transactions to share data; Data warehousing; Data continuity with ED, ambulatory, OP	1.2%	64
Stage 6	Physician documentation (structured templates), full CDSS (variance & compliance), full R-PACS	5.2%	278
Stage 5	Closed loop medication administration	8.4%	448
Stage 4	CPOE (Computerized Provider Order Entry) Clinical Decision Support (clinical protocols)	13.2%	705
Stage 3	Nursing/clinical documentation (flow sheets), CDSS (error checking), PACS available outside Radiology	44.9%	2,396
Stage 2	CDR, Controlled Medical Vocabulary, CDS, may have Document Imaging; HIE capable	12.4%	662
Stage 1	Ancillaries - Lab, Radiology, Pharmacy - All Installed	5.7%	304
Stage 0	All three ancillaries not installed	9.0%	480
			N=5337

U.S. EMR ADOPTION STATUS - HIMSS

Stage	Cumulative Capabilities	2011 Q4	Number of Hospitals	2013 Q3	Number of Hospitals
Stage 7	Complete EMR; CCD transactions to share data; Data warehousing; Data continuity with ED, ambulatory, OP	1.2%	64	2.2%	120
Stage 6	Physician documentation (structured templates), full CDSS (variance & compliance), full R-PACS	5.2%	278	11.1%	604
Stage 5	Closed loop medication administration	8.4%	448	20.9%	1,136
Stage 4	CPOE (Computerized Provider Order Entry) Clinical Decision Support (clinical protocols)	13.2%	705	15.1%	821
Stage 3	Nursing/clinical documentation (flow sheets), CDSS (error checking), PACS available outside Radiology	44.9%	2,396	31.9%	1,734
Stage 2	CDR, Controlled Medical Vocabulary, CDS, may have Document Imaging; HIE capable	12.4%	662	8.4%	457
Stage 1	Ancillaries - Lab, Radiology, Pharmacy - All Installed	5.7%	304	3.5%	190
Stage 0	All three ancillaries not installed	9.0%	480	6.9%	375
			N=5337		N=5437
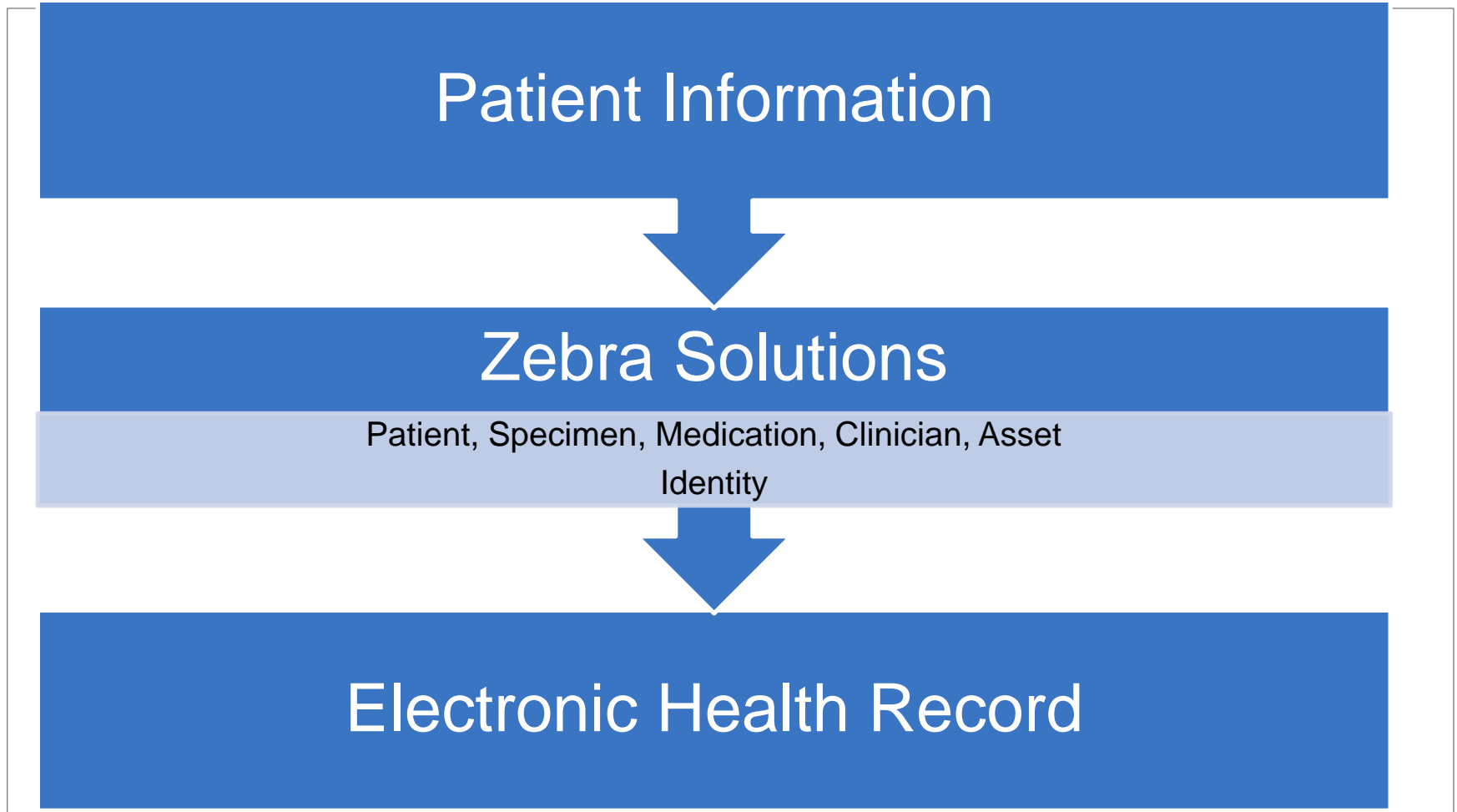
ANALYTICS IN HEALTH CARE

Mostashari Makes IT Personal on the Road to Predictive Analytics and Accountable Care

Date: 08.02.2013 | Zach Urbina">Zach Urbina

Why big data, healthcare analytics require key partnerships
Author Name **Kyle Murphy, PhD** | Date **August 6, 2013** | Tagged Accountable Care,

Health Care CIOs Cite Growing Impact of Analytics

🖨 Print   📋 Reprints   ✉ Email

🐦 Tweet ⟨10⟩   in Share ⟨1⟩   f Like ⟨2⟩   g+ +1

The U.S. health care industry is increasingly turning to big data to improve outcomes, reduce costs and better allocate resources, despite obstacles.

Healthcare Analytics Sought For Population Health Management

Healthcare analytics market to exceed $10bn by 2017
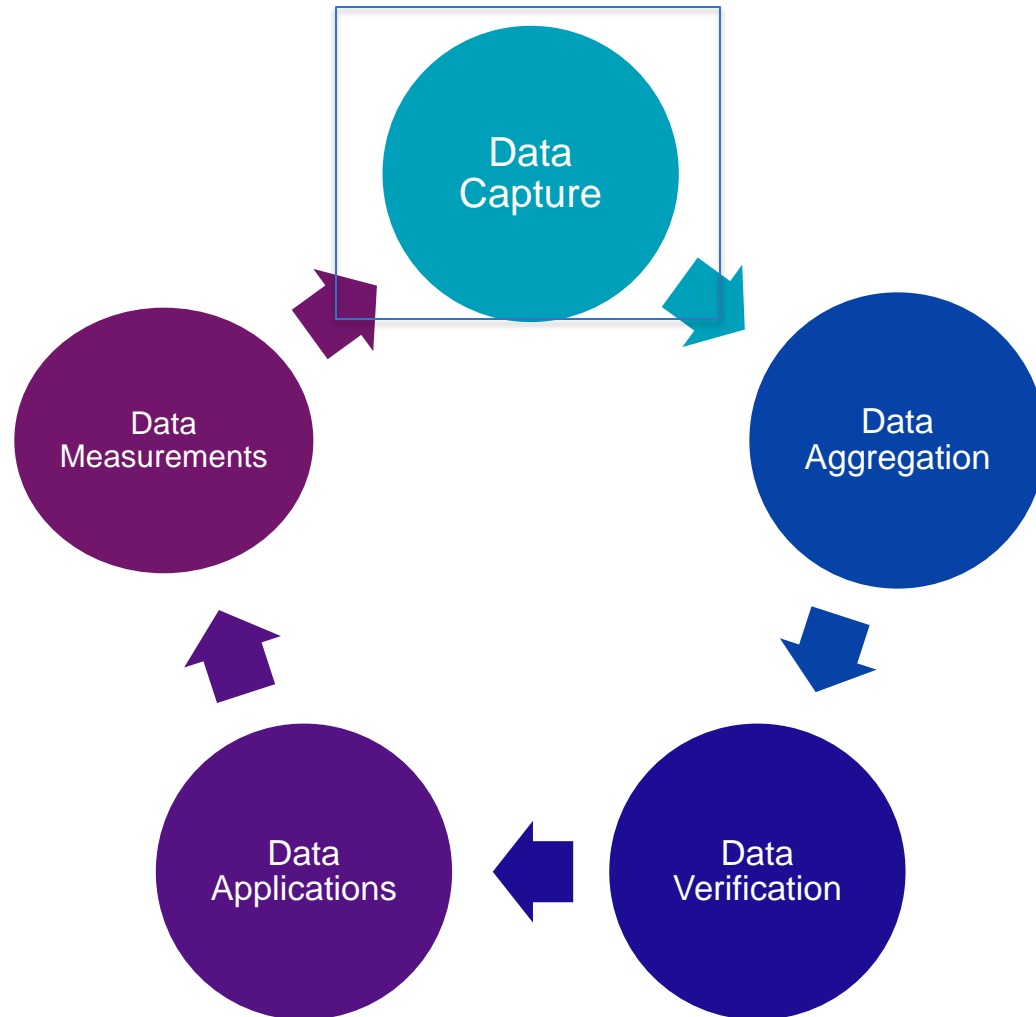
ISSUES WITH ANALYTICS IN HEALTHCARE

Primary obstacles to widespread analytics adoption

- ■ Organizational
- ■ Data
- ■ Financial

Obstacle	Percentage
Ability to get the data	37%
Culture does not encourage sharing information	35%
Lack of understanding how to use analytics to improve the business	34%
Lack of management bandwidth due to competing priorities	25%
Lack of executive sponsorship	24%
Lack of skills internally in the line of business	23%

Source: IBM Global Business Report

ANALYTICS ECOSYSTEM

Zebra Confidential

HEALTHCARE FACTOID

- Each year about 2,500 people go to emergency rooms to be treated because of injuries caused by using a toothbrush—most injuries happen when a fall occurs while brushing (Food & Drug Administration).

STAFFING

- The need to do more with less
  - Shortage of Nurses
  - Shortage of Doctors
- This will be one of the most critical healthcare issues of the next ten years

'Double whammy': Nursing shortage starts in the classroom

Need a nurse? Chicago may need 11,000 nurses in years to come

TEXAS TRIBUNE
Shortage of Doctors Tough to Fix
By BECCA AARONSON
Published: August 22, 2013

AREA OF FOCUS
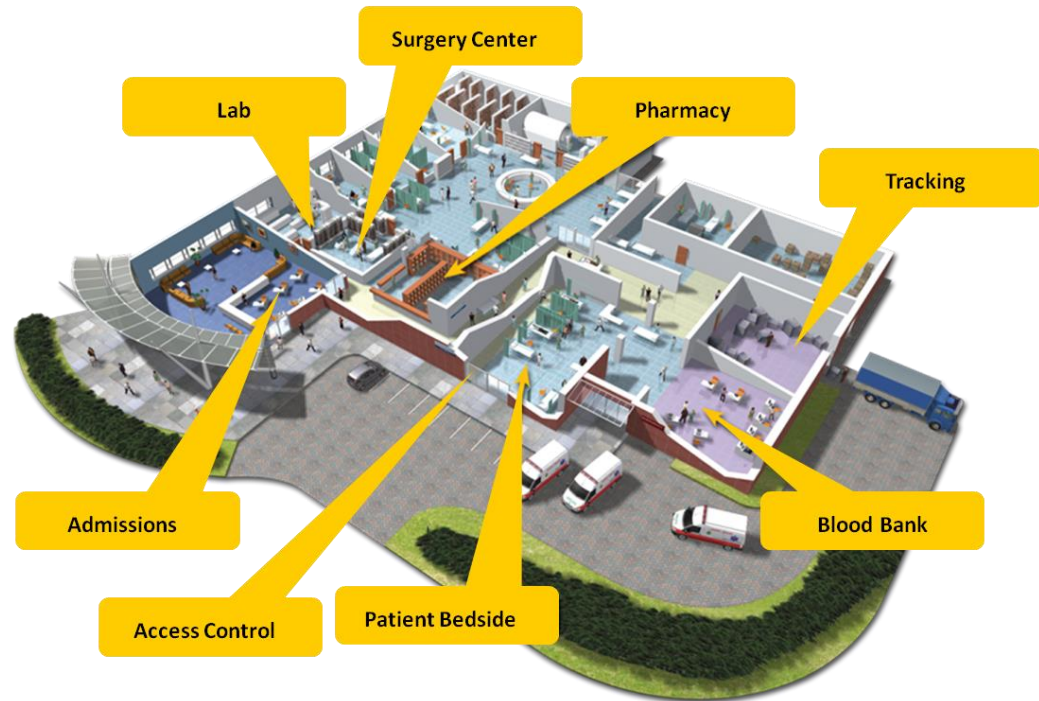# – ACUTE CARE

ZEBRA TECHNOLOGIES

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SOLUTION SETS FOR FOCUS

- Excellent Eight
  1. Patient Identification
  2. Point of Care (bedside)
  3. Medication Administration
     - Pharmacy
  4. Sample Processing
     - Lab
  5. Asset Tracking
  6. Access Control
  7. Materials Management
  8. Surgery Center

DECISION MAKERS & INFLUENCERS IN HEALTHCARE

- Chief Information Officer – See profile

- Chief Technology Officer

- IT Directors (seamless integration, budgets, business value)

- Chief Nursing Officer (employee morale, enhance patient experience and reduce cost) – See Profile

- Clinical Informatics Director / Chief Nursing Information Officer

- Chief Medical Information Officer – See Profile

Patient Safety Committee Members

- Laboratory Director: Influencer (Performance) – See Profile

- Pharmacy Director: Influencer (Performance)

- Registration/Admitting Director: Influencer (Performance) and User (Efficiency)

WHAT IT TAKES

- Focused sales team
    - This does not work by sending the retail rep to a hospital

- Focused Subject Matter Expert
    - Not a sales rep, a workflow and HC consultant

- Software expertise – both Zebra's but really knowledge of the hospital operating systems and EHRs
    - Focusing on different areas of the hospital, with different ISVs

- Patience
    - Healthcare sales take a LONG time to come to fruition

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FINAL HEALTHCARE FACTOID

- Turn the TV/computer off and go to bed! Getting less than 5 hours of sleep doubles your chances of heart attack, according to a British study that tracked 10,000 people over an eight-year period.