![Healthcare Strategy Forum logo]

Healthcare Strategy Forum

2nd & 3rd April 2019

Research Report

Total Delegate Group: **238**

This report is based on survey findings of the delegates for the Healthcare Strategy Forum on the 2nd and 3rd April 2019, comprising of 238 Chief Executives, CIOs and other strategic, IT and operational leaders in the NHS.

To deepen our insights, we interviewed the highest decision makers in face-to-face and telephone interviews to discuss trends and issues being tackled in their organisations.
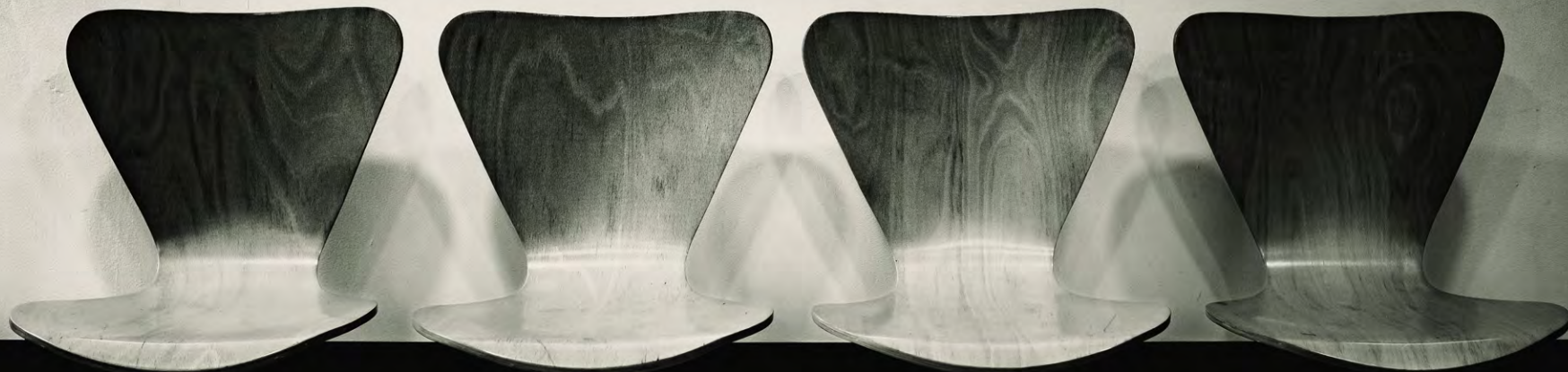
21 C-Level

74 Directors

65 Heads of Department
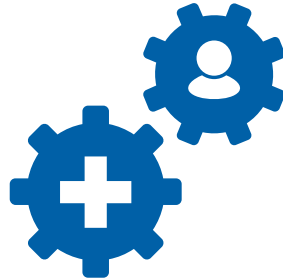
72 Management

6 Other

MAIN FINDINGS OF THE REPORT

SERVICE DELIVERY

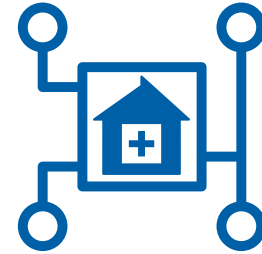NHS leaders are prioritising improvements in how services are delivered

HEALTH AND SOCIAL CARE

There is an ongoing drive for health and social care to be integrated effectively

SELF-SERVICE CAPABILITY

Developing self-service capabilities for both staff and patients was highlighted as an urgent issue

DIGITAL HOSPITAL

Harnessing new technologies and innovations stood out as a top improvement initiative

The key issues being tackled by the Chief Medical Information Officer at one of the UK's most digitally advanced GDE trusts:
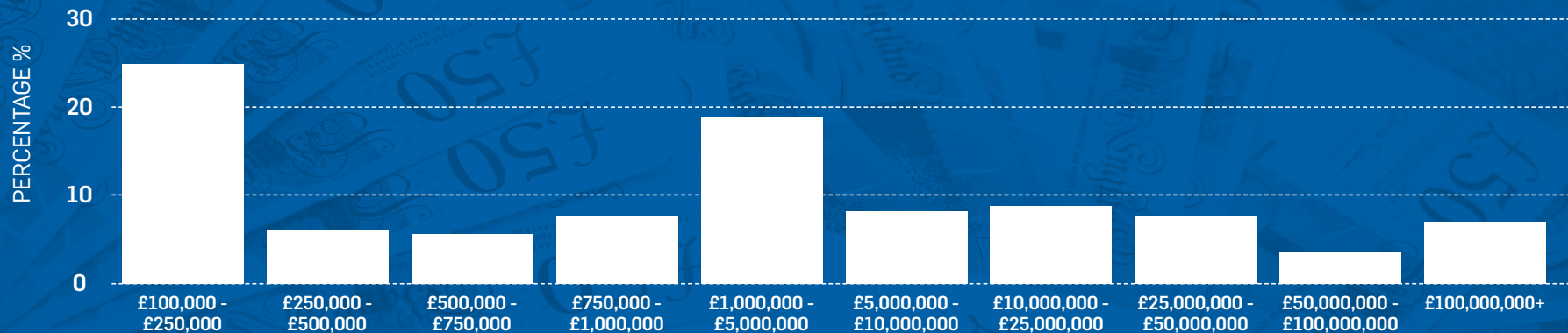
- Using data from electronic patient records
- Training staff to do QI and research in a paperless hospital

The challenges being prioritised by the ICT Director at one of the busiest trusts in the East of England:

- Automation and orchestration of ICT activities
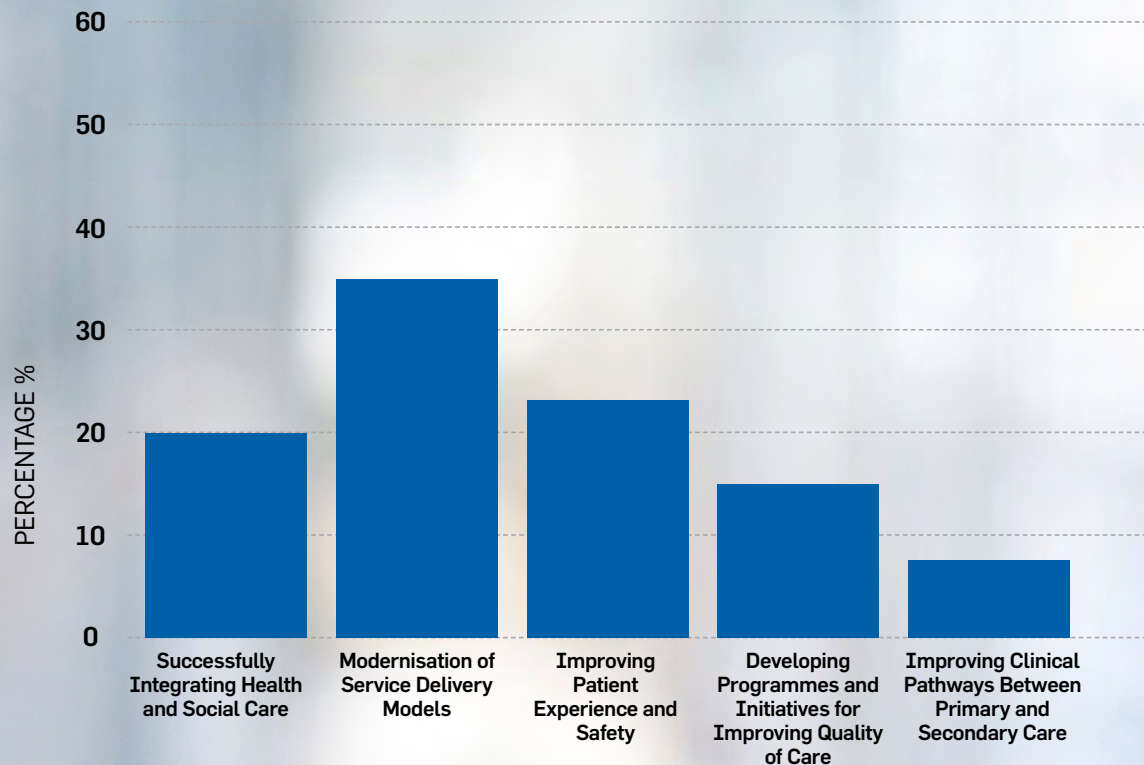- Reducing operating costs
- Agile working

COMBINED SPENDING POWER OF GROUP

£3.5billion

PERCENTAGE %

30									
20									
10									
0									

£100,000 - £250,000 | £250,000 - £500,000 | £500,000 - £750,000 | £750,000 - £1,000,000 | £1,000,000 - £5,000,000 | £5,000,000 - £10,000,000 | £10,000,000 - £25,000,000 | £25,000,000 - £50,000,000 | £50,000,000 - £100,000,000 | £100,000,000+

BUDGET RESPONSIBILITY PER PERSON

TOP STRATEGIC PRIORITY

PERCENTAGE %

60	
50	
40	
30	
20	
10	
0	

Successfully Integrating Health and Social Care
Modernisation of Service Delivery Models
Improving Patient Experience and Safety
Developing Programmes and Initiatives for Improving Quality of Care
Improving Clinical Pathways Between Primary and Secondary Care

Above all else, modernising service delivery models across the business was highlighted as the key strategic priority for the group.

Much of the group also emphasised the need to improve patient experience and safety.

TOP IMPROVEMENT INITIATIVE

- 🔵 **Improving Prescribing Confidence, Competence and Performance Towards Safe Prescribing**

- 🟡 **Recruiting and Retaining Top Clinical Talent**

- 🔵 **Harnessing Technology and Innovation Using a 'Digital Hospital' Approach**

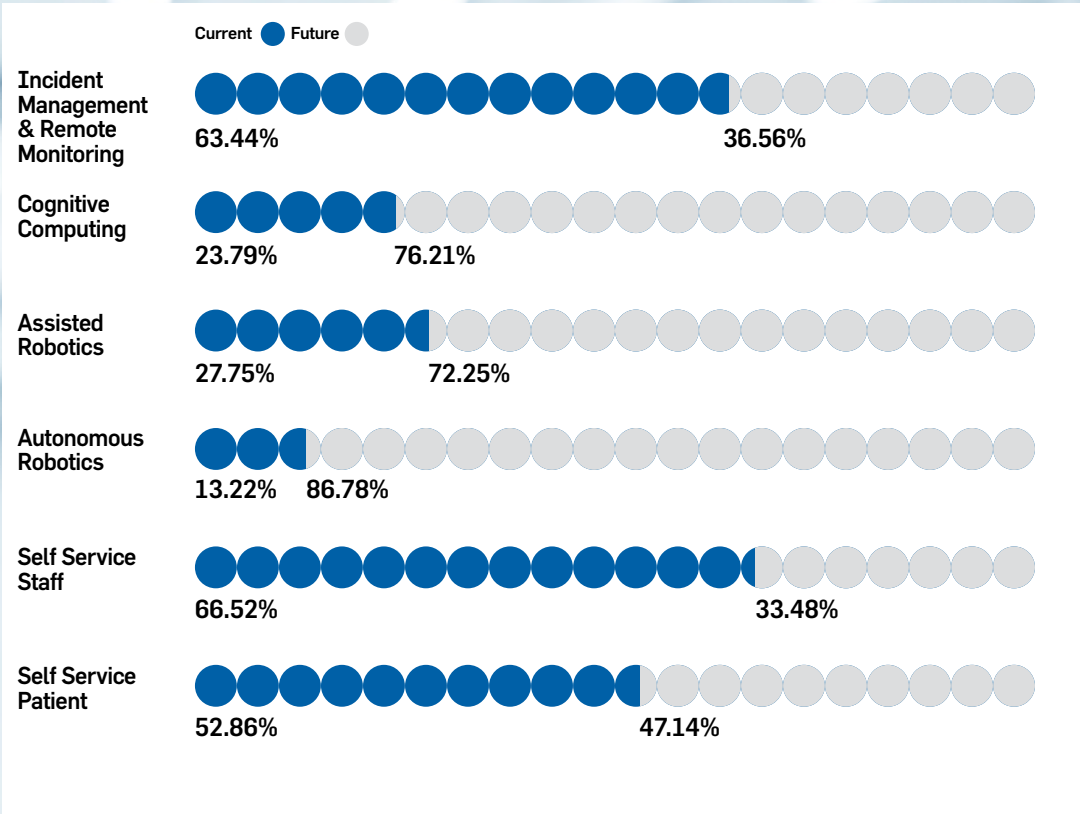- 🔴 **Implementing Preventative Measures Across the Hospital to Drive Efficiency Savings**

- 🟢 **Harnessing Cutting Edge Technologies Such as Robotics in a Clinical Setting**

Pie chart: 28%, 13%, 18%, 6%, 35%
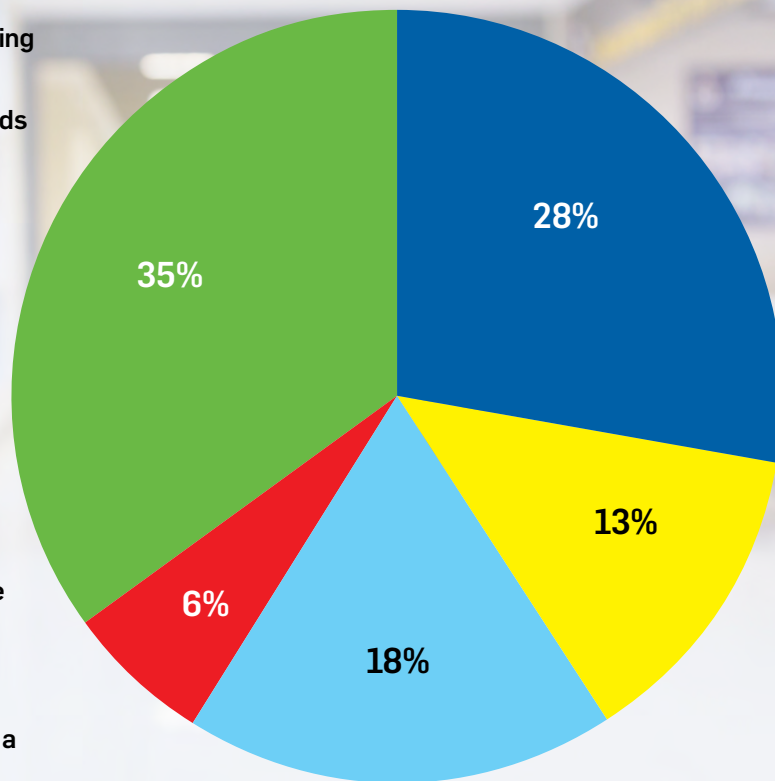
Senior clinicians are struggling to ensure health and social care is integrated effectively, with a focus on service improvements and outcomes - not just administrative reorganisation.

Respondents also highlighted their need to use a digital approach in their strategy and harness new technology and innovation.
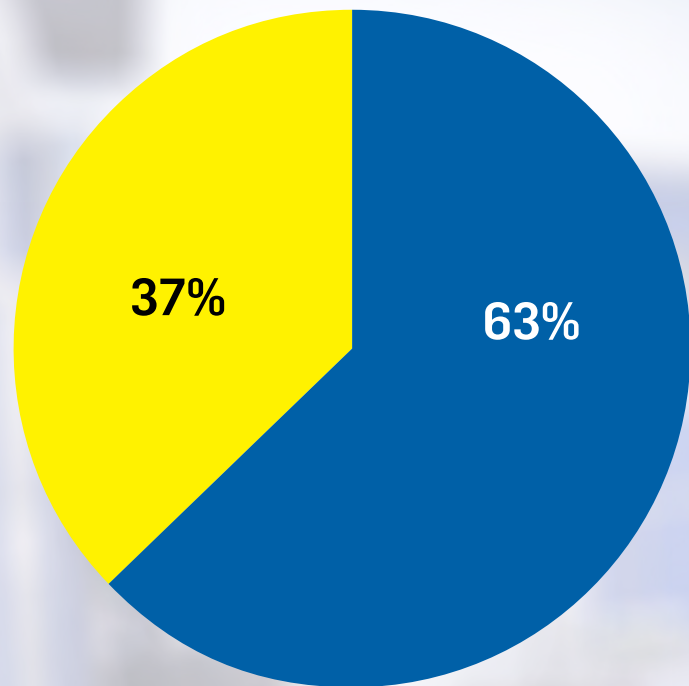
HEALTHCARE STRATEGY FORUM/RESEARCH REPORT 2019

CURRENT OR FUTURE PRIORITIES

Current ● **Future** ○

Priority	Current	Future
Incident Management & Remote Monitoring	63.44%	36.56%
Cognitive Computing	23.79%	76.21%
Assisted Robotics	27.75%	72.25%
Autonomous Robotics	13.22%	86.78%
Self Service Staff	66.52%	33.48%
Self Service Patient	52.86%	47.14%

Some priorities are considered primarily as a future focus for the group, such as autonomous robotics and cognitive computing.

However, the majority of the group specified that innovations enabling self-service for both staff and patients is a significant priority that needs to be tackled urgently.

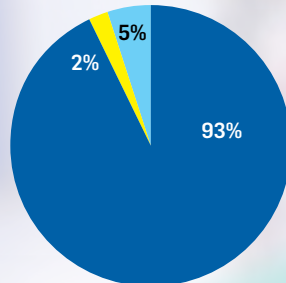# IT PURCHASING 'DECISION MAKER' OR 'INFLUENCER'

IT spend is planned to increase in the future, and the overwhelming majority of respondents wish for even higher adoption of new technologies.

The major influencers of the group who directly impact solution purchasing decisions understand that their IT spend needs to increase to meet wider departmental initiatives.
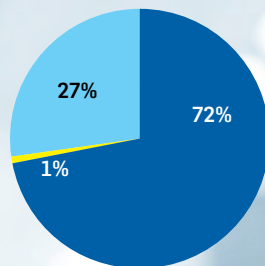
37%

63%

● Influencer ● Decision maker

AS A DECISION MAKER, ICT SPEND WILL LIKELY

32%

5%

63%
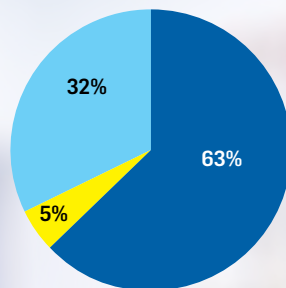
● Increase ● Decrease ● Stay the same

AS AN INFLUENCER, ICT SPEND WILL IDEALLY

2%

5%

93%

● Increase ● Decrease ● Stay the same

SPEND MAPPING

CLOUD SERVICES

38% 62%
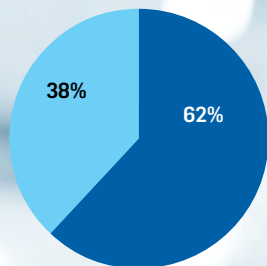
● Increase ● Decrease
● Stay the same

MOBILITY / MOBILE APPLICATIONS

27% 72% 1%

● Increase ● Decrease
● Stay the same
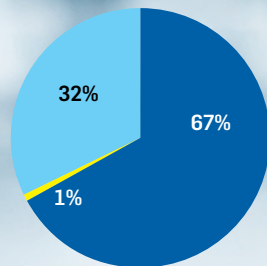
RPA (ROBOTIC PROCESS AUTOMATION)

67% 32% 1%
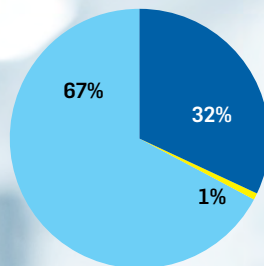
● Increase ● Decrease
● Stay the same
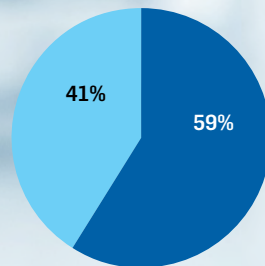
CYBER SECURITY

37% 63%
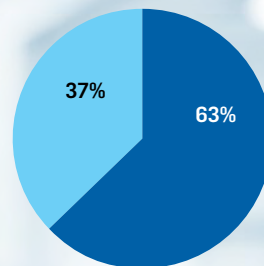
● Increase ● Decrease
● Stay the same

BUSINESS INTELLIGENCE

32% 67% 1%

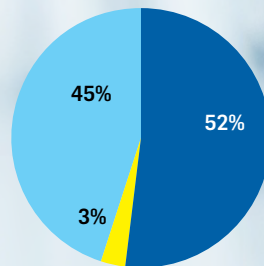● Increase ● Decrease
● Stay the same
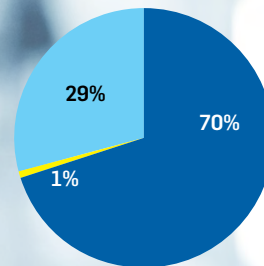
BIG DATA AND PREDICTIVE ANALYTICS

41% 59%

● Increase ● Decrease
● Stay the same

PERFORMANCE MANAGEMENT

45% 52% 3%

● Increase ● Decrease
● Stay the same

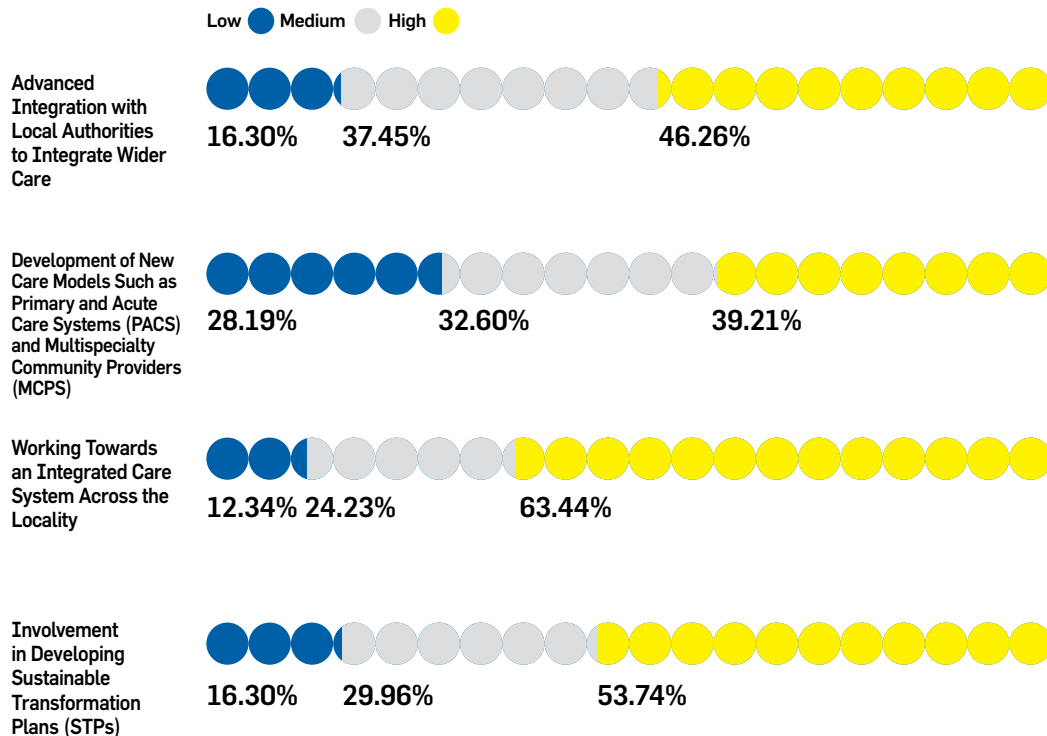### PATIENT PORTAL SELF SERVICE

29% 70% 1%

● Increase ● Decrease
● Stay the same

Technologies surrounding patient portals, mobility and business intelligence are very much at the forefront of our group's budget plans.

NHS trusts have considerable challenges digitising their legacy infrastructure but understand this must become a reality in order to underpin future delivery of services and technology.

LOW, MEDIUM OR HIGH PRIORITY AREAS

Low ● Medium ● High ●

Advanced Integration with Local Authorities to Integrate Wider Care

16.30%   37.45%   46.26%

Development of New Care Models Such as Primary and Acute Care Systems (PACS) and Multispecialty Community Providers (MCPS)

28.19%   32.60%   39.21%

Working Towards an Integrated Care System Across the Locality

12.34% 24.23%   63.44%

Involvement in Developing Sustainable Transformation Plans (STPs)

16.30%   29.96%   53.74%

Although many issues are deemed to be of high importance by NHS leaders, over 63% of those surveyed stressed that working towards an integrated care system across the locality is a major priority area.

STRATEGY FORUMS
Live Events

FORUM iQ
Analytics & Research

FORUM LINK
Collaboration App

All our Strategy Forums combine industry leading searchable analytics through Forum IQ - our delegate discovery platform. Key client investment data is blended with enhanced networking capability via our Forum Link app for everyone to intelligently connect through multi-channel exchanges during our live Strategy Forums.

Deep understanding and clever tech connecting smart people in smooth interactions. Goodbye static conferences, hello evolution.

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