



Healthcare Strategy Forum

11th & 12th June 2019

Research Report

Total Delegate Group: **190**



This report is based on survey findings of the delegates for the Healthcare Strategy Forum on the 11th and 12th June 2019, comprising of 190 Chief Executives, CIOs and other strategic, IT and clinical 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.

26

C-Level

77

Directors

44

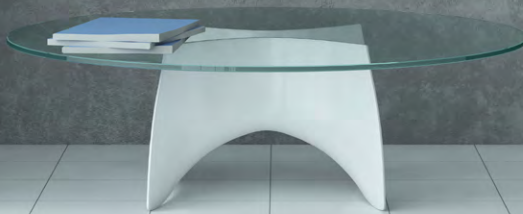
Heads of
Department

41

Senior
Management

2

Other



MAIN FINDINGS OF THE REPORT



PATIENT JOURNEY

Technologies driving efficiencies in the patient journey are being heavily invested in



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

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

The key issues being tackled by the Chief Information Officer at Betsi Cadwaladr University Health Board:

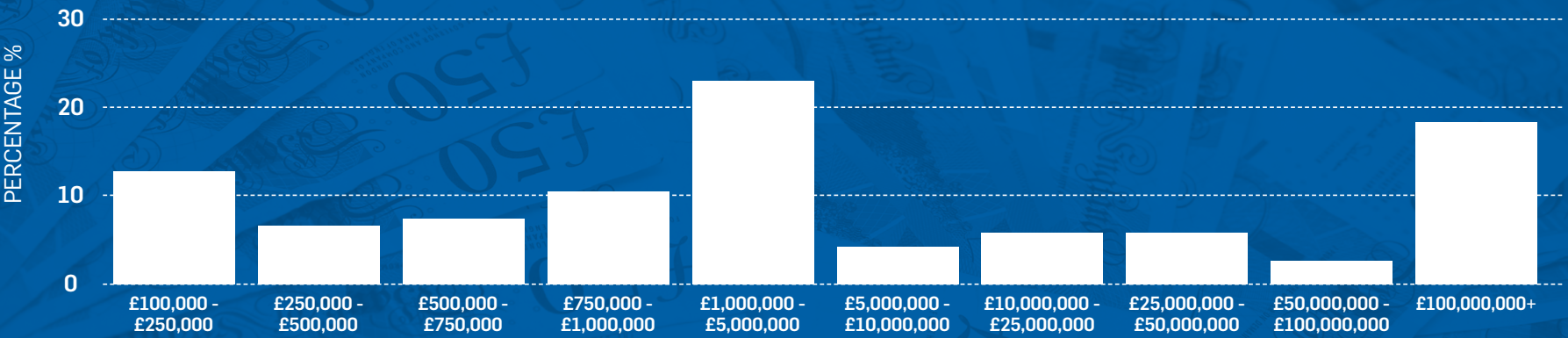
- Digitisation of the paper record
- Reducing costs and increasing efficiencies across acute, community and primary care

The challenges being prioritised by the CClO and Consultant Psychiatrist at North East London NHS Foundation Trust:

- Exploring solutions to promote and embed agile working
- Paperless integrated care records
- Unified communication solutions

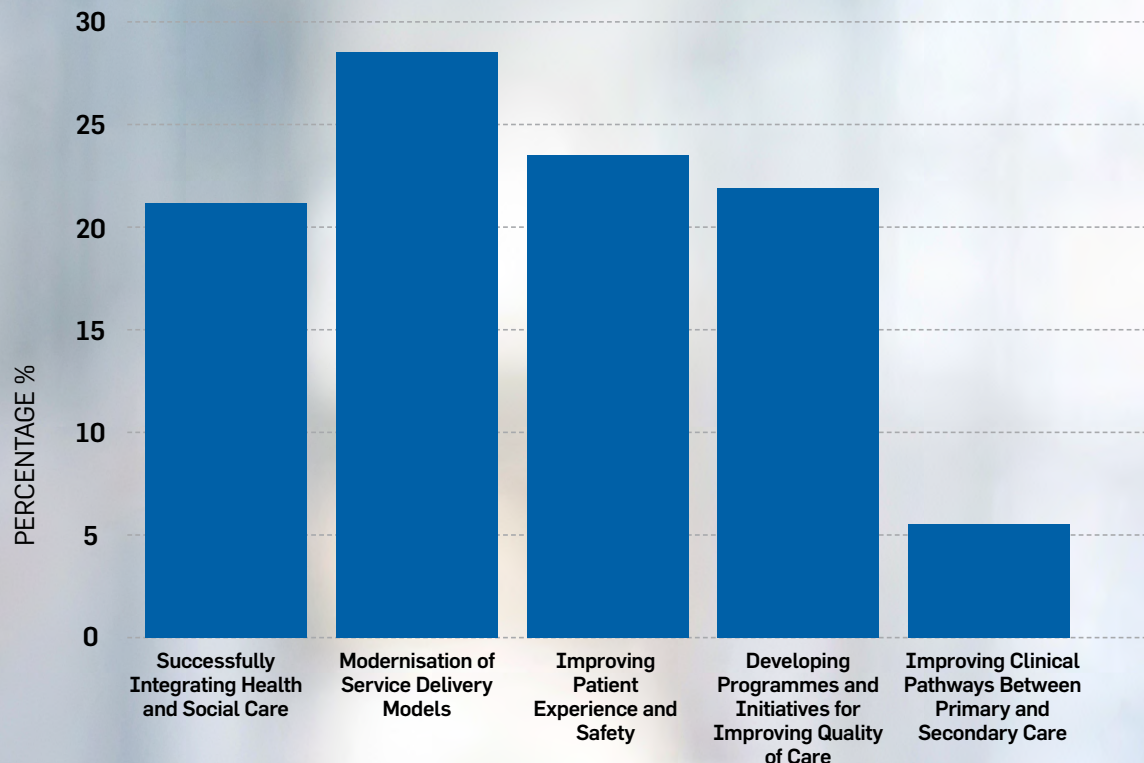
COMBINED SPENDING POWER OF GROUP

£4.8billion



BUDGET RESPONSIBILITY PER PERSON

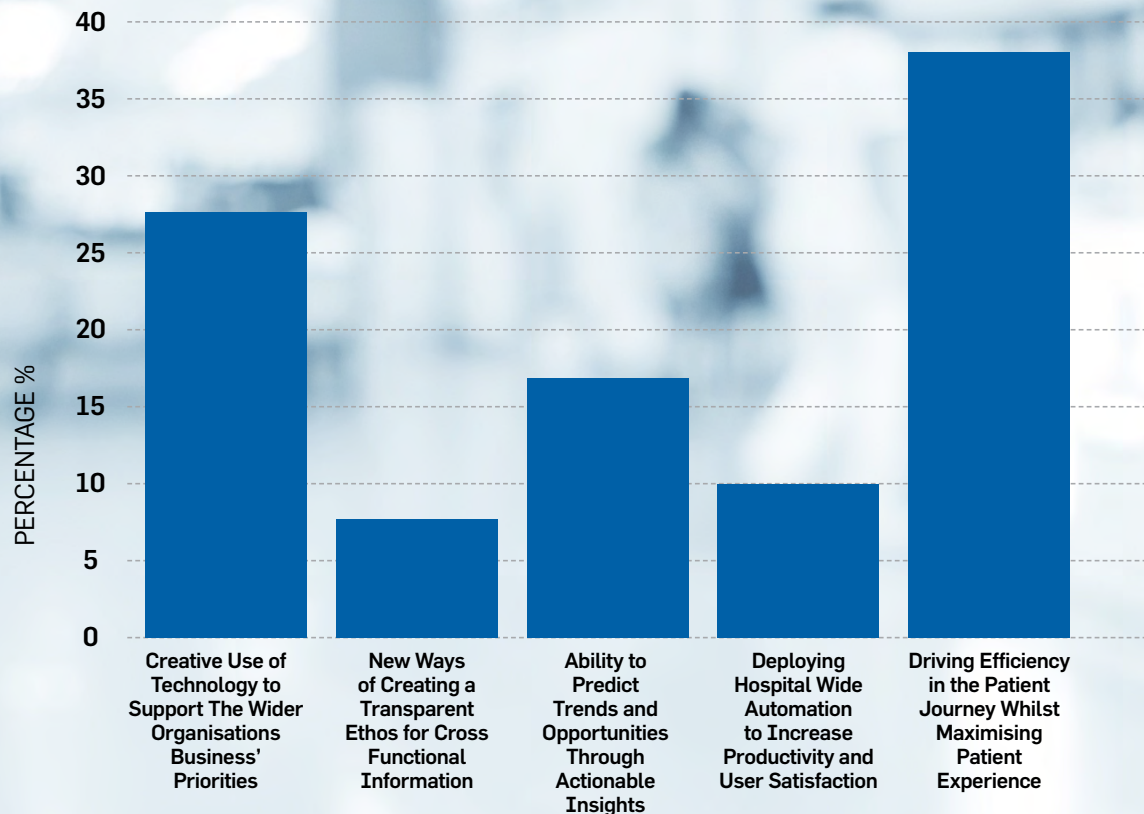
TOP STRATEGIC PRIORITY



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 develop effective programmes and initiatives for improving quality of care.

TOP TECHNOLOGICAL PRIORITY

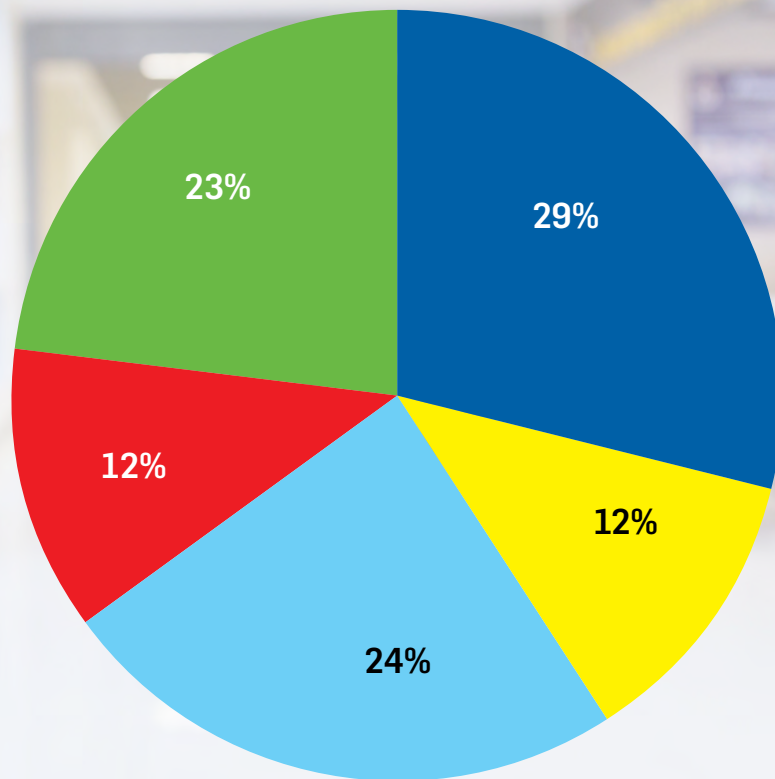


NHS leaders are taking urgent action to ensure patient experience is maximised in the drive to improve efficiency in the patient journey.

Besides this, innovative technologies are being increasingly adopted to support the priorities of the wider organisation.

ORGANISATIONAL AREAS OF IMPROVEMENT

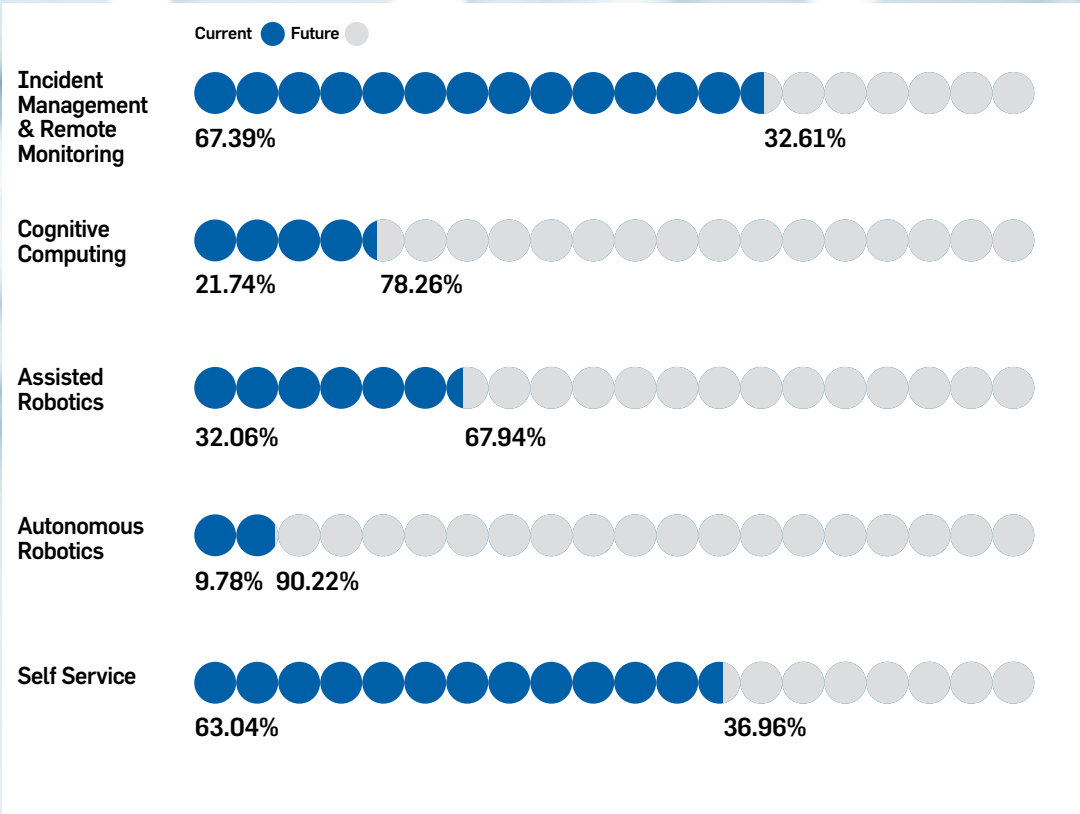
- Integrating care locally to improve services and outcomes
- Refining funding and efficiency by cutting waste and harnessing better methodologies
- Strengthening and retaining the workforce through training and better planning
- Bettering patient safety through learning, inspecting and improving
- Harnessing technology and innovation using a 'digital hospital' approach



The group stressed how they 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 strengthen and retain staff through workforce development and long-term planning.

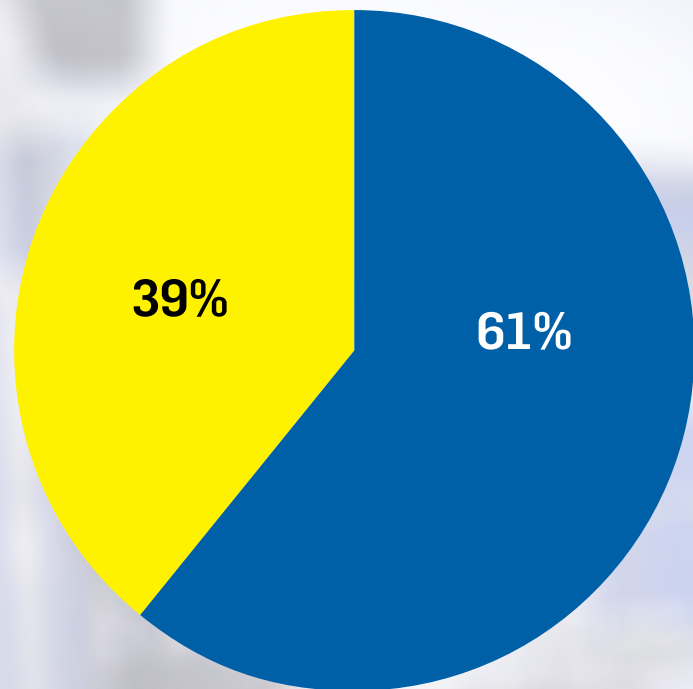
CURRENT OR FUTURE PRIORITIES



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

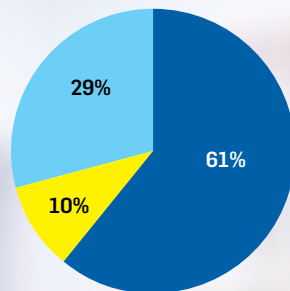
However, the majority of the group specified that automation and AI-powered innovations enabling self-service for both staff and patients are a significant priority that needs to be tackled urgently.

IT PURCHASING 'DECISION MAKER' OR 'INFLUENCER'



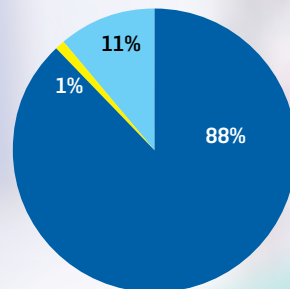
● Influencer ● Decision maker

AS A DECISION MAKER,
ICT SPEND WILL LIKELY



● Increase ● Decrease ● Stay the same

AS AN INFLUENCER,
ICT SPEND WILL IDEALLY

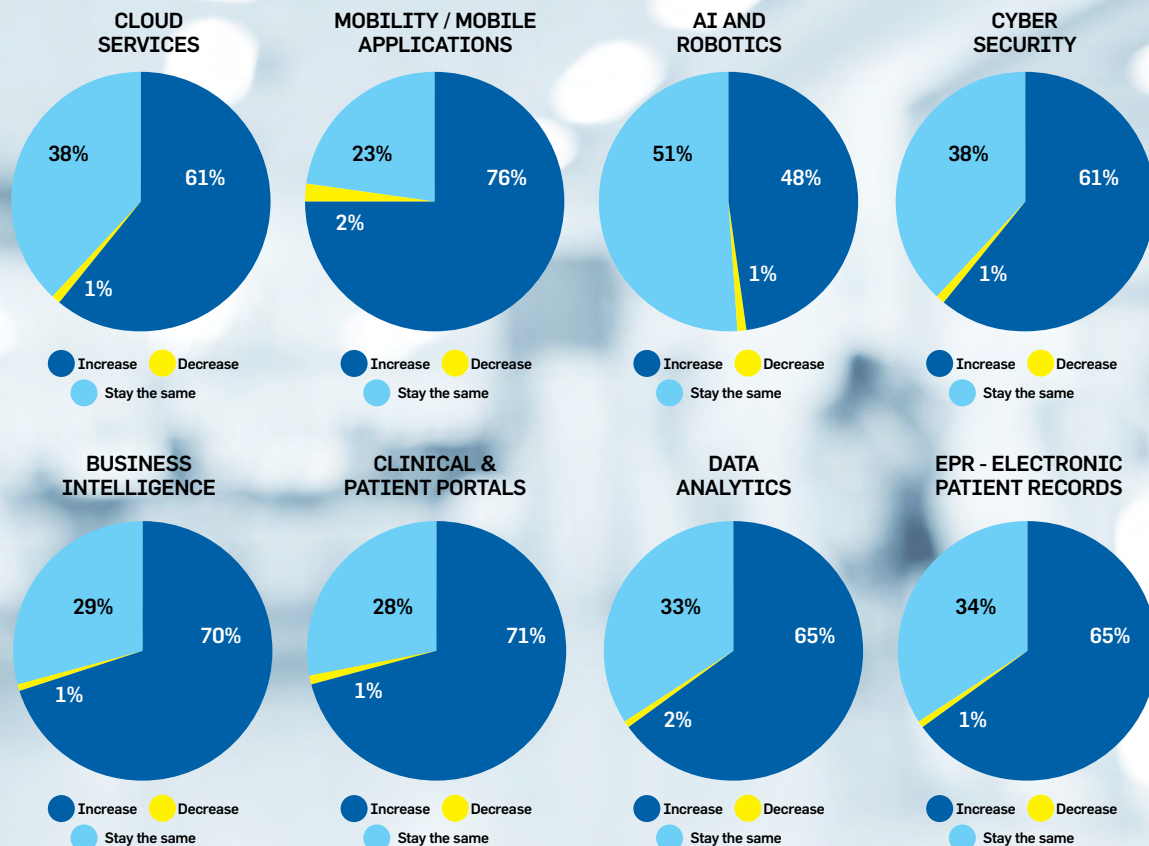


● Increase ● Decrease ● Stay the same

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 do not hold IT budgets but directly influence solution purchasing decisions understand that their IT spend needs to increase to meet wider departmental initiatives.

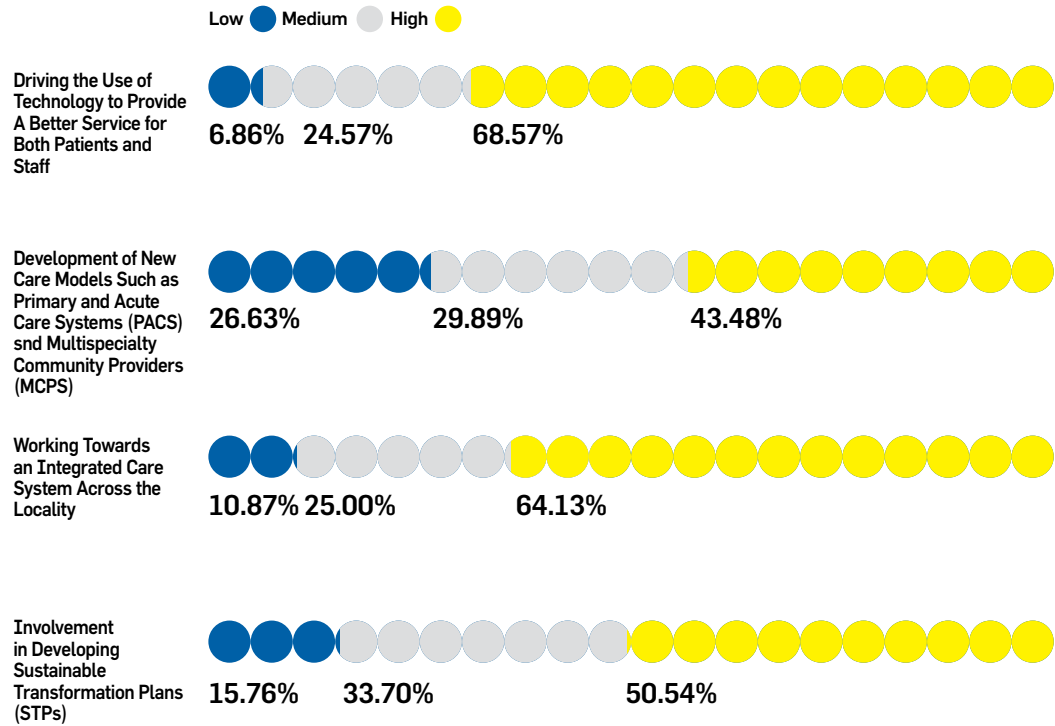
SPEND MAPPING



Technologies surrounding EPR, 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



Although many issues are deemed to be of high importance by NHS leaders, 70% of those surveyed stressed that driving the use of technology to provide a better service for both patients and staff is a major priority area.



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

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