Hello, and welcome. As a recovering physician, I’m still in close contact with the clinician community. And when speaking to them there are a few topics that keep bubbling up. Physician burnout, new ways of working and digital transformation. I’ll tell you on that last one, they’re not always calling it that.

And so I was particularly interested in this year’s research question, are digital transformation and personalized care delivering on clinician expectations?

So in order to help answer this, we surveyed over 350 clinicians, building on the data from last year’s inaugural report. We also went beyond the United States, into UK, Germany, Australia and New Zealand. So now touching three continents for a more global perspective. But given our audience today, the research that we’ll show will be US-focused.

Here’s a snapshot of who we spoke to. Over half the respondents were from the US, and it skewed a bit more urban, a bit more male, a little bit older, and it was roughly a 60-40 split between primary care and specialist care. So what did they tell us?

What we expected to hear, that digital transformation was happening at health systems everywhere. And that’s what we heard. 78% of clinicians said that digital transformation for them, was ongoing. What we also heard, is that it was happening far faster than anyone had expected. According to 59% of clinicians, it was happening far faster than they had expected. But perhaps the most interesting thing here is that, a number of clinicians believe that they were close to the end of digital transformation. In fact 16% of clinicians believe that their organizations had already completed the digital transformation. But digital transformation is not an end destination, its an ongoing journey. So while those organizations may have
completed a set of digital initiatives, the process is one that has to constantly evolve.

So taking a step back. We’ve seen that clinician exposure to digital transformation has been more or less ubiquitous. But has it been delivering on what has been expected? Well according to our clinicians, not always. 69% said that it contributed to work related stress. And nearly 50% said they had an increased burden and wasted time. But there may be a slight paradox here, because, for an almost equally large number, 61%, said that it was actually helping their organizations be more productive.

So is this a zero sum game here? No, absolutely not.

We’re actually quite encouraged to see that for 68% of clinicians, their feedback was taken into account in order to help improve the digital work environment.

In an ideal world, digital transformation should meet the expectations of the health organizations as well as the clinicians in their daily practice. So what’s preventing that from happening? Well here are the top three reasons according to our clinicians. 37% said that the tools that were introduced did not fit into their clinical workflows, and we know we’ve heard that before. 32% said they had not received proper training, although I’ll note that this was actually better than last year’s results. And another 32% said that they had a lack of communication when it came to the change within their organization.

The good news is, that some of those things are addressable. And the better news is, that clinicians are still using digital tools, even if their organizations don’t require them to. But the key is it needs to help them better serve their patients. Whether that be to improve their clinical decision making through clinical decision support tools, or bring more data into the room through wearable monitoring devices, or help them meet patients where they are through virtual health.

Building on this and going one step further, there are some service areas our clinicians said are better served with digitally enabled care. And that really relates to those aspects where the patient is engaging outside of the room. Whether that be for ongoing disease management, which 70% said. Or coordination of care, that transition from hospital to home for example, according to 64%. Or for preventative care and screenings, according to 60%. But ultimately what we’re hearing here is that these digital tools need to help patients and be patient centered.

So switching gears for a second to personalized care. This is an eye popping number, 98%. It’s not often that you see that kind of positive resounding sentiment. But 98% of clinicians said that providing more personalized care, is of major importance to them. And when we talk about personalized care here, we’re talking about experienced focused care which takes into account the preferences and social circumstances of patients and not just their health conditions.
Now the reasons that clinicians are providing personalized care are multifaceted. And here are the top three reasons. I was actually quite surprised to see that clinical effectiveness wasn’t the number one reason. It was actually increasing patient satisfaction. Now this is all very compelling, so why isn’t it happening more? Well there are some barriers today. And I’ll just call your attention to the number one barrier here, according to 46% of clinicians; balancing time and patient volumes. So those physicians are basically telling us that they want to provide personalized care but they don’t have the time to do that. So for those innovators in the room today, there’s an opportunity to automate and scale personalization.

But of course, scaled personalization has to rest on the backbone of a successful digital transformation. And here are the top three prerequisites, according to our clinicians, to make digital transformation successful. The first is to be adjusted to patient needs. For example, their health problems and digital skills. The second is to be adjusted to the healthcare employees’ needs—taking into account their workload and workflow for example. And the third is to include training of all employees.

So to bring it all together, a key to successful digital transformation, is to make sure that clinicians feel supported and that what we’re providing to them is patient centered. We need to keep listening to clinicians and help them better see that the process is one that is ongoing. And when done right, there will be continuous feedback, so that clinician and patient feedback is integrated. The ongoing transformation will be successful when it’s continually adapted to those that it’s serving.

Now here are three points that we have to help you get there faster. The first is, to fight the friction. You need to adapt digital tools to make them fit within the clinical workflow. Also, you need to be able to provide customized training so that clinicians can thrive within that environment. The second is to offer the right incentives to spark the use of digital. And that means going beyond just financial incentives to go into non-financial incentives. And the third is to make continuous improvement part of transformation. We need to accelerate that feedback loop so that all users are benefiting.

Personally, I look forward to when we’re able to come back here and share data that shows that clinicians are feeling more supported, inspired and invested in the ongoing work of digital transformation.

Let’s help them get there.

Thank you.