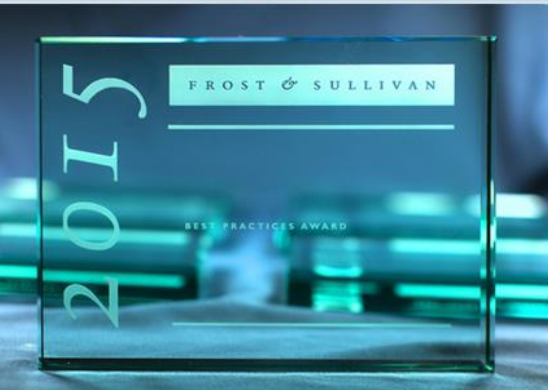




## 2015 North American Hospital Operations Management Information Technology Market Leadership Award



FROST & SULLIVAN



50 Years of Growth, Innovation & Leadership

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## Background and Company Performance

### *Industry Challenges*

As the migration to value-based healthcare accelerates, provider organizations, especially hospitals, face increased pressure to reengineer existing business procedures. The preparation for a dramatically reshaped future means adopting new and different types of health IT solutions that go beyond core clinical IT platforms or traditional revenue cycle solutions. In order to remain relevant and profitable, hospitals need to design new models to improve patient care quality, implement new tracking methods for administration and financial processes for reduction of unnecessary expenditures, and create patient engagement and relationship solutions to increase patient satisfaction ratings for compliance with the government's agenda to support increasing healthcare quality in the United States (US).

Health IT is transformative and disruptive and encompasses everything that enables the collection, searching, and analysis of health data. Electronic health records (EHRs) are at the heart of health IT. While EHRs have been around for almost 20 years, for the past five years, US healthcare providers (physicians and hospitals) have been almost singularly focused on accelerating the transition to EHRs in order to qualify for Meaningful Use and capture much-needed incentive funds provided by the Centers for Medicare & Medicaid Services EHR Incentive Program. As the EHR incentive program comes to an end in 2016, Frost & Sullivan predicts that many hospitals will enter a "post EHR era," where increased financial resources will be freed up to devote to upgrading legacy financial and administrative IT systems that have become outdated. This allows hospitals to search out new IT solutions to increase internal efficiency and reduce unnecessary spending. To remain profitable in the changing healthcare environment, hospitals are demanding updated and fully integrated hospital information systems (HIS), with capabilities of "next generation" analytics for financial, administrative, and clinical departments to increase hospital interoperability, estimate future expenditures, and track patient care to increase care quality. Additionally, HIS should include tools for customer relationship management (CRM) to increase patient engagement, allowing hospitals to receive high satisfaction ratings, and therefore, large amounts of government funding.

### *Market Leadership of Infor*

Infor's streamlined, tightly integrated solutions are recognized throughout the industry as best-in-class and are utilized by 72% of hospitals in the US with over 150 beds. In order to combat the challenges of the HIS market and allow hospitals to operate at optimal efficiency, Infor created the Cloverleaf Integration and Information Exchange Suite.

### **Connecting Back and Front Office Functions to Increase Operational Efficiency**

Infor created the Cloverleaf Integration and Information Exchange Suite as a highly robust,

cross-clinical system connecting back and front offices to increase hospital operational efficiency. The unique, full-suite solution integrates a variety of different data and document types across hospital systems, increasing interoperability. The full-suite interface promotes streamlined health information exchange and includes the following solutions for:

- Full cost financial management, allowing hospitals to more quickly and accurately identify areas of unnecessary expenditures.
- Unified human resources with capabilities for attracting new healthcare employees, training modules, and employee talent-tracking.
- Analytics for patient turnover rates, patient relationship management, and easy assignment of reimbursement codes.
- Supply chain management to prioritize vendor selection, eliminating unnecessary vendors, and reducing spending on hospital supplies.
- Capital asset lifecycle management for streamlined inventory control and maintenance plans for medical assets.
- Next-generation performance management helping to plan future investments, budgets, and patient engagement strategies.

In addition to the core solutions, customers can opt to integrate Infor's Enterprise Master Person Index (EMPI) that allows for patient matching, which reduces the amount of duplicate patient records. Customers can also choose to utilize Infor's Lawson Clinical Bridge that links data from clerical, financial, and operational systems, creating an additional level of hospital interoperability and efficiency.

### **Enhanced Customer Engagement and Patient Satisfaction Rates with SalesLogix**

With the changing healthcare landscape focusing on patient satisfaction, hospitals are beginning to concentrate on patient management and engagement. Infor recently acquired SalesLogix, expanding its platform with population health management and CRM capabilities. SalesLogix displays a complete view of customer health interactions, allowing different departments within a hospital to effectively collaborate and respond with health opportunities or reminders of appointments and medications specific to individual patients. Many times patients are not compliant with doctors' recommendations; in fact, only about 38% of patients go to follow-up appointments and less than half take prescriptions as prescribed. This reduces treatment efficacy, resulting in lower satisfaction ratings, and therefore, reduced government funding of hospitals. By utilizing Infor's SalesLogix, hospitals are given access to a variety of different applications to aid the management of patient relationships and increase patient engagement, increasing treatment efficacy and patient satisfaction.

## **Making the Jump to the Cloud to Enhance Suite Security**

Infor noticed a 600% increase in the number of customers opting to utilize cloud-based solutions in the past year. Reacting to this growing trend, Infor created the Infor Cloverleaf Cloud Health Information Exchange (HIE), providing hospitals a choice of implementing the original platform on-premise or using an advanced version of Infor CloudSuite™. In addition to the suite's capabilities to create internal hospital interoperability, improve workflow, and integrate of information across departments, the Cloverleaf Cloud HIE has the following added benefits:

- It reduces hospitals total cost of ownership by eliminating costly servers.
- It grants hospital staff access to information when off site, promoting connectivity and improving patient outcomes and turnover.
- Since it is hosted in direct connection with Infor's CloudSuite™, the system has automatic upgrades, continuously providing up-to-date solutions.
- The combination of Amazon Web Services security and Infor's added security measures ensures information storage and transmission is secure and aligned with HIPPA regulations, promoting collaboration between payers, providers, and governments across regions.

Additionally, Infor extended the core platform of the Cloverleaf Integration and Health Information Exchange Suite with an integration to Infor's EMPI solution, expanding the platform's core capabilities to match hospitals' changing needs.

## **Infor's Commitment to Creating Solutions Enhances Operational Efficiency from Start to Finish**

Infor's Value Engineering team meets with the potential client to determine their specific needs and goals during the initial contact. Oftentimes, hospitals and payers are unaware of Infor's platform's capabilities, so by determining the specific needs and goals of the client, Infor is able to identify areas of opportunities for its solutions to create the most optimal value. After the solution is implemented, Infor assigns each project a Client Success Manager, who has in-depth knowledge of the specific solutions and systems of the account. When faced with a question or problem, the customer contacts the Client Success Manager, who then works with the product development manager to address the question or find the correct department supporting the query, and provides a solution back to the customer with fast and accurate results. Since the Client Success Manager has a detailed understanding of the specific account, they can ensure that the information is tailored to the systems' specifications, saving time and eliminating any confusion that can be created by generalized support systems. As Infor released its CloudSuite™ Healthcare solution, it created the UpgradeX program to help current Infor customers migrate from on-premise solutions to the cloud-based platform.

## **Leveraging Feedback from Customers and Industry Experts to Remain on the Cutting-Edge of Development**

As more customers customize their current platforms or integrate more solutions into the CloudSuite™ core, Infor gathers information regarding the occurrences of specific customizations, allowing it to track hospitals' changing needs. Utilizing this information, Infor can integrate the most commonly utilized customizations into the platform's core, ensuring optimized solutions for their customers. Additionally, Infor holds a Healthcare Council with C-level officials of providers, payers, and medical device manufacturers across a variety of different regions and sizes to have in-depth discussions regarding segment convergences, industry needs, and the future technological development areas. When first created, this council met on an annual basis. Due to attendee request, Infor now holds a face-to-face council session biannually and has monthly council calls, underlining the value that Infor's customers recognize in the meetings.

### *Conclusion*

The Patient Protection and Affordable Care Act reorganizes hospital funding and bases reimbursements largely off patient satisfaction ratings, causing hospitals to reexamine internal efficiency and patient turnaround times. Infor created the Cloverleaf Integration and Information Exchange Suite to connect financial, clinical, and administrative functions to increase hospital efficiency and decrease unnecessary expenditures. Infor's platform can be implemented either on hospital premise or on Infor's highly secure cloud network, CloudSuite™, allowing customers consistent access to the most technologically advanced solutions for optimal operating efficiency.

For its transformational innovation and full-suite solution, Infor has achieved a leadership position in the hospital information systems market, and Frost & Sullivan is proud to bestow Infor with the 2015 North America Market Leadership award in hospital operations management information technology market.

## Significance of Market Leadership

Ultimately, growth in any organization depends upon customers purchasing from your company, and then making the decision to return time and again. Loyal customers become brand advocates; brand advocates recruit new customers; the company grows; and then it attains market leadership. To achieve and maintain market leadership, an organization must strive to be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.



## Understanding Market Leadership

As discussed on the previous page, driving demand, strengthening the brand, and competitive differentiation all play a critical role in a company's path to market leadership. This three-fold focus, however, is only the beginning of the journey and must be complemented by an equally rigorous focus on the customer experience. Best-practice organizations therefore commit to the customer at each stage of the buying cycle and continue to nurture the relationship once the customer has made a purchase. In this way, they build a loyal, ever-growing customer base and methodically add to their market share over time.

## Key Performance Criteria

For the Market Leadership Award, Frost & Sullivan analysts focused on specific criteria to determine the areas of performance excellence that led to the company's leadership position. The criteria that were considered include (although not limited to) the following:

Criterion	Requirement
Growth Strategy Excellence	Demonstrated ability to consistently identify, prioritize, and pursue emerging growth opportunities
Implementation Excellence	Processes support the efficient and consistent implementation of tactics designed to support the strategy
Brand Strength	The possession of a brand that is respected, recognized, and remembered
Product Quality	The product or service receives high marks for performance, functionality and reliability at every stage of the life cycle
Product Differentiation	The product or service has carved out a market niche, whether based on price, quality, uniqueness of offering (or some combination of the three) that another company cannot easily duplicate
Technology Leverage	Demonstrated commitment to incorporating leading edge technologies into product offerings, for greater product performance and value
Price/Performance Value	Products or services offer the best value for the price, compared to similar offerings in the market
Customer Purchase Experience	Customers feel like they are buying the most optimal solution that addresses both their unique needs and their unique constraints
Customer Ownership Experience	Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service
Customer Service Experience	Customer service is accessible, fast, stress-free, and of high quality



## The Intersection between 360-Degree Research and Best Practices Awards

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.



## Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Awards follow a 10-step process to evaluate award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 <b>Monitor, target, and screen</b>	Identify award recipient candidates from around the globe	<ul style="list-style-type: none"> <li>• Conduct in-depth industry research</li> <li>• Identify emerging sectors</li> <li>• Scan multiple geographies</li> </ul>	Pipeline of candidates who potentially meet all best-practice criteria
2 <b>Perform 360-degree research</b>	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> <li>• Interview thought leaders and industry practitioners</li> <li>• Assess candidates' fit with best-practice criteria</li> <li>• Rank all candidates</li> </ul>	Matrix positioning all candidates' performance relative to one another
3 <b>Invite thought leadership in best practices</b>	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> <li>• Confirm best-practice criteria</li> <li>• Examine eligibility of all candidates</li> <li>• Identify any information gaps</li> </ul>	Detailed profiles of all ranked candidates
4 <b>Initiate research director review</b>	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> <li>• Brainstorm ranking options</li> <li>• Invite multiple perspectives on candidates' performance</li> <li>• Update candidate profiles</li> </ul>	Final prioritization of all eligible candidates and companion best-practice positioning paper
5 <b>Assemble panel of industry experts</b>	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> <li>• Share findings</li> <li>• Strengthen cases for candidate eligibility</li> <li>• Prioritize candidates</li> </ul>	Refined list of prioritized award candidates
6 <b>Conduct global industry review</b>	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> <li>• Hold global team meeting to review all candidates</li> <li>• Pressure-test fit with criteria</li> <li>• Confirm inclusion of all eligible candidates</li> </ul>	Final list of eligible award candidates, representing success stories worldwide
7 <b>Perform quality check</b>	Develop official award consideration materials	<ul style="list-style-type: none"> <li>• Perform final performance benchmarking activities</li> <li>• Write nominations</li> <li>• Perform quality review</li> </ul>	High-quality, accurate, and creative presentation of nominees' successes
8 <b>Reconnect with panel of industry experts</b>	Finalize the selection of the best-practice award recipient	<ul style="list-style-type: none"> <li>• Review analysis with panel</li> <li>• Build consensus</li> <li>• Select winner</li> </ul>	Decision on which company performs best against all best-practice criteria
9 <b>Communicate recognition</b>	Inform award recipient of award recognition	<ul style="list-style-type: none"> <li>• Present award to the CEO</li> <li>• Inspire the organization for continued success</li> <li>• Celebrate the recipient's performance</li> </ul>	Announcement of award and plan for how recipient can use the award to enhance the brand
10 <b>Take strategic action</b>	Upon licensing, company may share award news with stakeholders and customers	<ul style="list-style-type: none"> <li>• Coordinate media outreach</li> <li>• Design a marketing plan</li> <li>• Assess award's role in future strategic planning</li> </ul>	Widespread awareness of recipient's award status among investors, media personnel, and employees

## About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best in class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.