



Workplace Transformation in Healthcare: The Time Is Now

WRITTEN BY:



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KEY STATS:

The top drivers for workplace transformation in healthcare are:

51% Increased employee productivity

37% Business agility/continuity/resilience

35% Improved regulatory compliance and employee work council or union requirements

Source: IDC's Hybrid Work Maturity Study, March 2022

KEY TAKEAWAY:

A digital-first approach to delivering healthcare provides the opportunity to transform the healthcare workplace, enabling hybrid work and addressing moral injury experienced by resource constrained healthcare professionals.



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A more flexible work environment would allow distressed healthcare professionals to disconnect from work for much-needed mental and physical breaks so that they can continue the important work of caring for their patients.



Reimagining the Workplace to Improve the Patient and Clinician Experience

The time is now for healthcare organizations not only to reimagine care delivery options but to transform the workplace to improve both patients' and healthcare professionals' experiences. Increasing financial pressure to see more patients in less time while delivering high-quality patient care, using electronic health records that have not lived up to the promise of increased efficiency, and mounting administrative burdens have pushed many healthcare providers over the edge. There is growing recognition that distressed healthcare providers are experiencing more than stress or burnout: They are suffering from moral injury, which is what happens when healthcare professionals repeatedly make choices that go against their professional oath of "First, do no harm." Moral injury is the result of wanting what is best for patient care and yet not being able to provide that care because of systemic constraints such as lack of time, staff, or clinical and financial resources. If not addressed, moral injury will have major implications on clinician satisfaction, and ultimately on the future of healthcare and patient outcomes.

A digital-first approach to meeting consumer demands for telehealth services and appointment scheduling also provides an opportunity to transform the workplace for healthcare professionals. Patients and providers want to continue using telehealth services, because they recognize its convenience as well as the financial and environmental value of reducing the need to travel for in-person care.

Equipping healthcare providers with intuitive solutions for hybrid work enhances clinical communication and collaboration across the continuum of care, regardless of where healthcare practitioners or patients are located. Less time spent on administrative tasks and more time interacting with patients enables healthcare professionals to get back to doing what they trained to do: take the utmost care of their patients. A more flexible work environment would allow distressed healthcare professionals to disconnect from work for much-needed mental and physical breaks so that they can continue the important work of caring for their patients.

Definition

Workplace transformation is defined as a fundamental shift in the work model to one that fosters human-machine collaboration (e.g., intelligent process automation, robotic process automation, chatbots, and augmented reality/virtual reality enhancements), enables new skills and worker experiences, and supports work across and within a (hybrid) spectrum of field, remote, and on-site environments. Workplace transformation is driven by the need for greater employee productivity, and organizations are redesigning policies, culture, technologies, and facilities to enable the hybrid work model. In healthcare, examples of workplace transformation include the increased use of telehealth and virtual care that enables healthcare organizations to offer hybrid work options to their clinical staff and to provide convenient access to care anywhere for their patients.

Workplace Transformation Benefits Both Healthcare Staff and Their Patients

Out of necessity, a hybrid work environment was embraced by healthcare organizations during the global pandemic to reduce the physical contact of patients, clinicians, and staff.

Hybrid work will endure because of the benefits of workplace transformation, which will help healthcare organizations to:

Improve healthcare professionals' productivity and efficiency. Increased productivity was a top 3 driver for workplace transformation, according to the *Hybrid Work Maturity Study* conducted by IDC in March 2022; healthcare respondents reported a 24% improvement in efficiency. The use of technology to support workforce transformation provides the necessary tools for faster communication and collaboration among care teams and delivery of care.

Address systemic issues that lead to burnout and moral injury. For years, professional nursing and medical associations have projected significant staffing shortages in the next 20 years, and the pandemic has only exacerbated those shortages. Time spent on burdensome administrative tasks that take healthcare providers away from providing direct patient care further distresses already burned-out staff. The effective use of collaborative technology enables healthcare providers to work where they can be most productive, regardless of location.

Improve the patient experience. Telehealth, virtual care, and digital front-door initiatives already underway before 2020 accelerated in response to the global pandemic. Overall, patients express satisfaction when asked about their virtual care experiences. Nearly three out of four consumers responding to IDC's *U.S. Consumer Healthcare Survey* (January 2022) reported that they were satisfied (36%) or very satisfied (37%) with their virtual visit experience. Consumers responding to this survey commonly mentioned, as benefits of virtual visits, that it was quicker to get an appointment and that they saved time not traveling to an in-person visit.

Achieve the "Quadruple Aim." The top 2 drivers for workplace transformation, according to IDC's *Hybrid Work Maturity Study*, are increased productivity (51%) and business agility/continuity/resilience (37%), which contribute to cost savings (29%), improved experiences for employees (30%), and improved engagement with customers (32%).

Reduce the carbon footprint in the community. Greater use of videoconferencing for both patient care and collaboration with colleagues will reduce the need to travel to in-person events, resulting in a positive environmental impact. A greater reduction in their carbon footprint will help healthcare organizations achieve their environmental, social, and governance (ESG) goals.

"Care Anywhere" and Data-Driven Clinical Workflow Initiatives Promote Workplace Transformation

Critical transformative trends in healthcare are leading healthcare organizations to also embark on workplace transformation. Many of these trends started with the call for healthcare reform, because the cost of providing care had reached unsustainable levels while not generating better patient outcomes. Chief among the trends was a shift from fee-for-service sick care to value-based care with a focus on improving outcomes by improving patient and clinical engagement. At-risk, value-based contracts provided healthcare organizations with the financial incentives they needed to invest in telehealth, virtual care, and digital front-door strategies to improve the patient experience.

Meanwhile, healthcare workforce shortages are looming. The United States faces a projected shortfall of between 37,800 and 124,000 physicians within 12 years, according to *The Complexities of Physician Supply and Demand: Projections from 2019 to 2034*, a report released by the Association of American Medical Colleges (AAMC). The shortage of nurses is even more dire, with the U.S. Bureau of Labor Statistics estimating that more than 275,000 additional nurses are needed from 2020 to 2030.

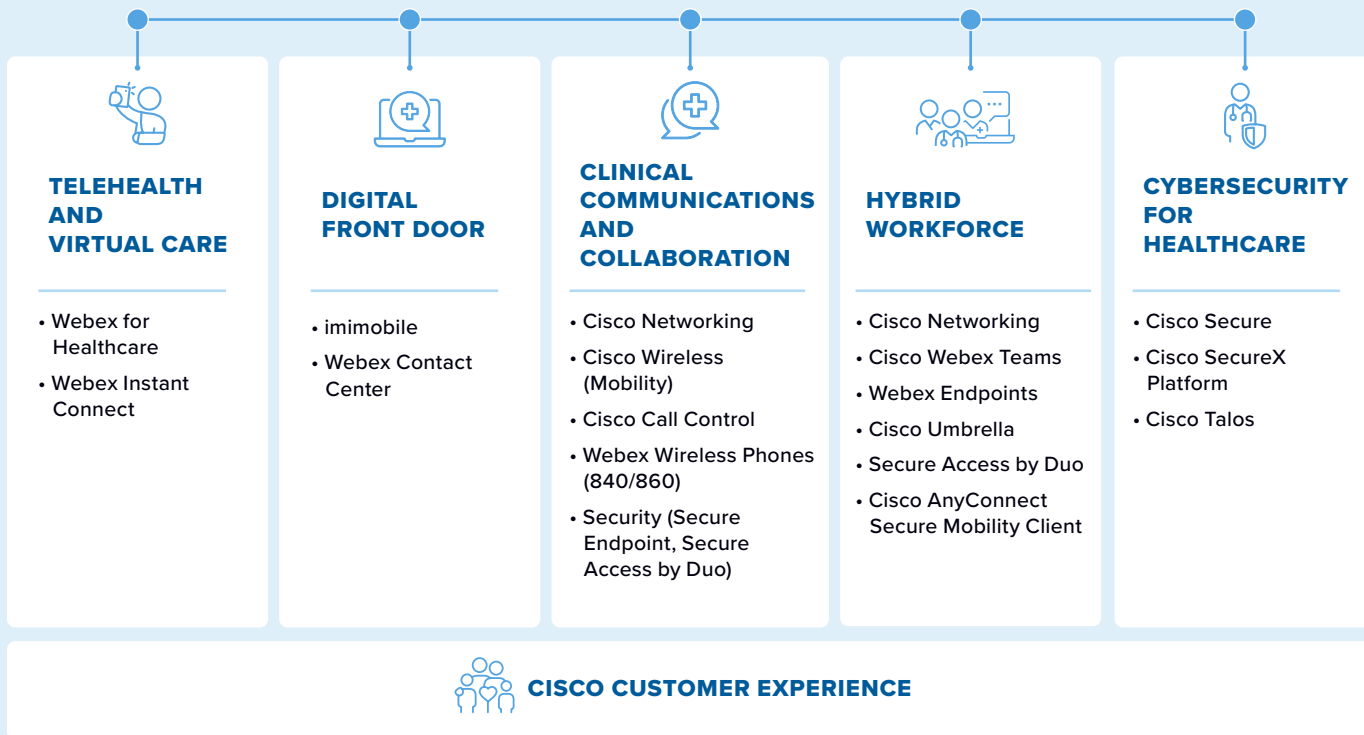
Clinician shortages put patient safety at risk while increasing the prevalence of burnout and contributing to moral injury. To address clinician turnover, healthcare organizations must look to creative solutions for improving employee retention by offering flexible workplaces, the opportunity to work from home, and better collaboration tools within the care facility.

When asked in IDC’s *Hybrid Work Maturity Study* what percentage improvement their organization experienced in 2021 because of investments in work transformation, healthcare providers reported having achieved a marked improvement in employee experience (30%), expanding the talent pool beyond existing geographical constraints (28%), attracting top talent (29%), and better employee retention (29%).

Considering Cisco

Cisco has a strong presence in the healthcare industry. For decades, its core networking technology has been part of the technology stack found in healthcare organizations worldwide. Today, Cisco’s expansive portfolio of products and services enables healthcare organizations to securely connect clinicians, care teams, and patients seamlessly—in a healthcare setting, at work, or at home. Cisco’s foundational technology platforms enable workplace transformation across the continuum of care, building off Cisco’s collaboration, mobility, networking, datacenter, and security technologies. Products and solutions for healthcare organizations looking to implement hybrid work are shown in **Figure 1** and discussed in the following sections.

FIGURE 1
Cisco’s Workplace Transformation Portfolio



Source: Cisco, 2022

Cisco's Workplace Transformation Portfolio *(continued)*



TELEHEALTH AND VIRTUAL CARE

Patients' expectations regarding where they want to receive care are shifting to at-home care. IDC's *U.S. Consumer Healthcare Survey* (January 2022) revealed that consumers are willing to receive home care for chronic or acute conditions (59%), hospital-at-home care for acute conditions (59%), and virtual visits (48%).



DIGITAL FRONT DOOR

Healthcare organizations are creating a digital front door that encompasses all touch points whereby providers can interact with patients digitally to drive better access, engagement, and experiences across the service continuum. The scope of today's digital front door expands well beyond enabling a patient portal, deploying a mobile application, or doing telehealth. Today's digital front door includes all aspects of the patient engagement experience, up to the point where patients physically walk through the door for their appointment. Virtual triage contact centers, video visits, appointment management, the digital intake process, and mobile support are all part of streamlining the patient engagement process and improving the overall patient experience through technology.



CLINICAL COMMUNICATIONS AND COLLABORATION

Access to secure clinical communications and collaboration solutions that strengthen care team coordination and enable clinicians to meet with patients and consult with specialists and other care providers virtually is more critical than ever. Nearly one out of four providers has deployed clinical communications and collaboration solutions, according to the *U.S. Healthcare Provider Technology and Connected Health Survey* (January 2022). Another 16% of respondents to the survey are planning on deploying this technology in 2022–2023.



HYBRID WORKFORCE

As healthcare employees and clinicians continue to work from home, secure remote access to healthcare IT systems becomes even more essential, because staff may be using personal devices with varying levels of security on networks not controlled by the healthcare organization. In fact, the ongoing struggle between employee flexibility and security requirements was cited as a business challenge by 48% of the healthcare respondents to IDC's *Hybrid Work Maturity Study*.



CYBERSECURITY FOR HEALTHCARE

Approximately one out of three healthcare respondents to IDC's *Hybrid Work Maturity Study* reported that securing the increased scale of remote users, devices, and apps was a top security challenge. With more remote healthcare workers accessing data from outside the four walls of the institution, more devices and endpoints being connected to the network, and more virtual care visits, increased security is a business imperative to help defend against escalating cyberattacks.



CUSTOMER EXPERIENCE

Cisco Customer Experience (CX) is an organization within Cisco dedicated to helping customers optimize their technology investments by delivering technical support, advisory services from Cisco's Critical Business Services team, IT managed services, professional services, and training and adoption services. Beyond the expertise of the organization, Cisco also has a dedicated healthcare practice within Cisco Customer Experience, providing tailored guidance specific to the healthcare industry.

Market Opportunities and Challenges

The market challenges that providers face present opportunities for a vendor such as Cisco, which delivers a broad portfolio of technologies that enable transformation.

Rapid pace of change: While there has been significant change in healthcare over the past decade because of healthcare reform and the shift from fee-for-service to value-based health, the pace of change due to the global pandemic has been unprecedented. Nearly half (46%) of the respondents to IDC's *U.S. Healthcare Provider Technology and Connected Health Survey* (January 2022) estimated that four to five years' worth of digital transformation occurred in 2021, and mean years of digital transformation for 2022 is estimated to be 1.8 years.

Security: The swift deployment of technology to enable staff and clinicians to work from home, accessing hospital IT systems and patient information from personal networks and devices, increased the risk of security incidents and placed additional strain on IT security teams. Cybercriminals wasted no time in exploiting the crisis to launch their attacks, ranging from phishing and stealing credentials to deploying malware and ransomware to hijack mission-critical systems. The FBI's Internet Crime Complaint Center (IC3) received 148 healthcare ransomware complaints in 2021, making healthcare the most attacked industry sector last year in the United States.

Intense financial cost pressures: Healthcare organizations have long been under extreme pressure to do more with fewer resources. The response to the COVID-19 crisis exacerbated the situation, with hospitals making significant investments in personal protective equipment (PPE), ventilators, and temporary field hospitals to meet the surging demand. Labor costs also rose, with increased overtime and higher hourly wages to retain healthcare workers and to meet staffing demands. Patients' deferring care and a dramatic reduction in elective surgeries (which are more lucrative) resulted in significant economic losses for healthcare organizations across the globe.

Competitive portfolio: Cisco's competitors are focused on expanding their solution portfolios in terms of breadth and depth of product capabilities, professional services, cloud computing options, and Internet of Things (IoT) services. For Cisco, successful strategy execution to broaden the portfolio requires a reinforcement of positioning in the enterprise space without alienation of the channel that has been so beneficial to the organization.

The Time to Act Is Now

Workplace transformation is occurring worldwide in many industries to respond to employees' desire for more flexible work accommodations, retain top talent, and expand recruiting beyond existing geographical constraints. The same is true for the healthcare industry. In fact, labor shortages due to clinician burnout and an aging clinician population accentuate the workplace challenges in healthcare.

Healthcare organizations must take immediate action to address the moral injury experienced by healthcare providers to stem staff turnover and retain top talent.



Healthcare organizations must take immediate action to address the moral injury and burnout experienced by healthcare professionals to reduce staff turnover and retain top talent.

IDC believes that effective use of the technology that enables hybrid work and “care anywhere” initiatives will go a long way toward addressing the major challenges healthcare organizations face today.

Telehealth and virtual care services will improve the patient experience and create opportunities for new revenue streams, much needed after the devastating financial impact to their bottom line from the loss of lucrative elective surgeries in 2020 and 2021.

Digital front-door capabilities will help remove administrative friction for patients and make it easier for them to engage with their healthcare providers. Collaboration technologies, like those found in clinical communications and collaboration solutions, will help improve workplace efficiency and experience for healthcare providers. And of course, security should be at the core of these solutions, to better protect healthcare organizations from increasingly insidious cyberattacks. To the extent that Cisco can address the challenges described in this paper, the company has a significant opportunity for success.

About the Analyst



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Lynne A. Dunbrack is group vice president for Public Sector, which includes IDC Government Insights and IDC Health Insights. She manages a group of analysts who provide research-based advisory and consulting services for payers, providers, accountable care organizations, IT service providers, and the IT suppliers that serve those markets. Lynne also leads the IDC Health Insights' Connected Health IT Strategies program. Specific areas of Lynne's in-depth coverage include mobile, constituency engagement, interoperability, digital transformation, privacy, and security. Technology coverage areas include clinical mobility (physician facing) and mobile health (consumer facing), end-to-end remote patient health monitoring for health, wellness and chronic conditions, Internet of Things (IoT), telemedicine and virtual care, and digital therapeutics.

[More about Lynne A. Dunbrack](#)

Message from the Sponsor

For over 20 years, Cisco's comprehensive approach to healthcare has been empowering organizations to take on new challenges and adapt to the ever-shifting care landscape. Cisco technology solutions have placed more than 17,000 healthcare organizations on the cutting edge of holistic, technology-enabled care.

Cisco is and will continue to be your trusted technology partner in healthcare, delivering a portfolio of solutions that securely connect providers, patients, and staff to move healthcare technology forward in times of change. With the unmatched breadth and performance of our portfolio and the industry-leading security embedded throughout our solutions, our customers across healthcare can focus on what they do best, which is caring for patients.

No matter what goals you are trying to achieve, we can help build the bridge to get you there.

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