

HIMSS

LEADERSHIP SURVEY

June 9, 2004



VENDOR CEO RESULTS: QUESTIONNAIRE INDEX

15th Annual HIMSS Leadership Survey

Sponsored by Superior Consultant Company, Inc.

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Participant Profile

Question 1

Which title best describes the position that you hold at your organization? (Please select only one).

Chief Executive Officer	73.20%
Consultant	13.40%
Chief Information Officer/Chief Technology Officer	3.70%
Vice President	3.70%
Other	3.70%
Director	2.40%
Analyst	0.00%
Chief Operating Officer	0.00%
Chief Financial Officer	0.00%
Executive Vice President	0.00%
Manager	0.00%

Question 2

Which best describes your company's *primary* business? (Please select only one.)

Consulting Firm	53.70%
Enterprise Application Vendor	17.00%
Other	11.00%
ASP/Outsourcing Vendor	9.80%
Departmental/Niche Application Vendor	7.30%
Networking Vendor	1.20%
Hardware Vendor	0.00%
Don't Know	0.00%

Question 3

Where is your organization's corporate headquarters? (Please select only one).

East North Central	20.00%
South Atlantic	18.80%
Mid-Atlantic	12.50%
Pacific	12.50%
Mountain	10.00%
West North Central	8.80%
West South Central	7.50%
New England	6.30%
East South Central	3.80%

East North Central: IL, IN, MI, OH, WI

East South Central: AL, KY, MS, TN

Mid-Atlantic: NH, NY, PA

Mountain: AZ, CO, ID, MT, NV, NM, UT, WY

New England: CT, ME, MA, NH, RI, VT

Pacific: AK, CA, HI, OR, WA

South Atlantic: DC, DE, FL, GA, MD, NC, SC, VA, WV

West North Central: IA, KS, MN, MO, NE, ND, SD

West South Central: AR, LA, OK, TX

Participant Profile (continued)

Question 4

What is your *primary* responsibility within your firm? (Please select only one.)

Strategy	53.70%
Consulting	26.80%
Other	7.30%
Product Development	4.90%
Marketing	3.70%
Sales	1.20%
Product Management	1.20%
Market Research	1.20%
Implementation	0.00%
Support	0.00%
Analysis	0.00%

Question 5

What percent of your company's business is focused on the health care industry?
(Please select only one.)

0-10%	2.50%
11-25%	6.10%
26-75%	7.40%
76-100%	84.00%
Don't Know	0.00%

Question 6

What segments of the healthcare market does your company target? (Please select all that apply.)

Hospital/Integrated Health System	80.50%
Physicians Office/Clinic	57.30%
Health plan/Insurer/Payor	39.00%
Alternate Healthcare Facility	32.90%
Federal Government	19.50%
Pharmaceutical	18.30%
Other	8.50%
Life Sciences	6.10%

Question 7

What are the total annual revenues of your company? (Please select only one.)

Less than \$5 Million	63.00%
\$5-\$9 Million	13.60%
\$10-\$29 Million	12.30%
\$30-\$49 Million	3.70%
\$50-\$99 Million	2.50%
\$100M-\$500 Million	1.20%
Over \$500 Million	2.50%
Don't Know	1.20%

IT Priorities (continued)

Question 8

Please identify the business issues you believe will have the most impact on health care *in the next two years*. (Please select five).

Cost Pressures	59.00%
Increasing Patient Safety/Reducing Medical Errors	55.40%
Adoption of New Technology	49.40%
Improving Operational Efficiency	39.80%
Improving Quality of Care	34.90%
HIPAA Compliance	31.30%
Nursing Shortage	27.70%
Clinical Transformation (Adopting Clinical Best Practices)	27.70%
Patient (Customer) Satisfaction	27.70%
Evidence Based Medicine	19.30%
Medicare Cutbacks	18.10%
Government Regulation	16.90%
National Health Information Infrastructure (NHII)	14.50%
Other Compliance Issues (non-HIPAA)	9.60%
Obtaining Capital	9.60%
Increased Competition	8.40%
Mergers/Consolidation	8.40%
Facilities Upgrades/Replacement	7.20%
Availability/Retention of Staff	4.80%
Other	4.80%
Complying with Managed Care Requirements	3.60%
Managed Care Fee Reductions	3.60%
Don't Know	0.00%

IT Priorities (continued)

Question 9a

Please indicate what you believe to be the top IT priorities for your clients at this time.
(Please choose five.)

Integrate Systems in Multi-Vendor Environment	50.60%
Implement Technology to Reduce Medical Errors/Promote Patient Safety	48.10%
Upgrade Security on IT Systems to Meet HIPAA Requirements	42.00%
Implement Privacy Modifications to Meet HIPAA Requirements	34.60%
Process/Workflow Redesign	32.10%
Replace/Upgrade Inpatient Clinical Systems	32.10%
Implement an Electronic Medical Record (EMR)	30.90%
Implement Wireless Systems (e.g. Wireless LANs)	28.40%
Implement EDI to meet HIPAA Requirements	28.40%
Deploy Internet Technology (e.g. Web-based Applications)	27.20%
Implement Enterprise-Wide Applications (MPR, ERP, Clinical Information Sharing)	21.00%
Outsource IT Functions (e.g. ASPs, infrastructure, other services)	18.50%
Train Personnel to Use Existing and Newly Installed Systems	18.50%
Replace/Upgrade Inpatient Financial/Administrative Systems	16.00%
Replace/Upgrade Ambulatory Care Systems (Clinical/Financial/Administrative)	16.00%
Improvement of IS Departmental Services, Cost Effectiveness and Efficiencies	14.80%
Upgrade Network Infrastructure (LANs, WANs)	14.80%
Design and Implement an IT Strategic Plan	13.60%
Recruit and Retain High Quality IT Staff	12.30%
Implement Speech Recognition Systems	3.70%
Other	1.20%

IT Priorities (continued)

Question 9b

Please indicate what you believe to be the top IT priorities for your clients in the next two years.
(Please choose five.)

Implement an Electronic Medical Record (EMR)	46.20%
Implement Technology to Reduce Medical Errors/Promote Patient Safety	46.20%
Implement Wireless Systems (e.g. Wireless LANs)	43.60%
Replace/Upgrade Inpatient Clinical Systems	42.30%
Implement Enterprise-Wide Applications (MPR, ERP, Clinical Information Sharing)	41.00%
Process/Workflow Redesign	37.20%
Integrate Systems in Multi-Vendor Environment	34.60%
Deploy Internet Technology (e.g. Web-based Applications)	30.80%
Improvement of IS Departmental Services, Cost Effectiveness and Efficiencies	21.80%
Replace/Upgrade Ambulatory Care Systems (Clinical/Financial/Administrative)	20.50%
Implement Speech Recognition Systems	16.70%
Replace/Upgrade Inpatient Financial/Administrative Systems	16.70%
Outsource IT Functions (e.g. ASPs, infrastructure, other services)	16.70%
Design and Implement an IT Strategic Plan	14.10%
Upgrade Security on IT Systems to Meet HIPAA Requirements	14.10%
Recruit and Retain High Quality IT Staff	12.80%
Upgrade Network Infrastructure (LANs, WANs)	10.30%
Implement EDI to meet HIPAA Requirements	7.70%
Train Personnel to Use Existing and Newly Installed Systems	6.40%
Implement Privacy Modifications to Meet HIPAA Requirements	6.40%
Other	0.00%

IT Barriers

Question 10

What is the most significant barrier to successfully implementing IT in your clients' organizations today? (Please select only one).

Difficulty in Proving IT Quantifiable Benefits/Return on Investment	27.20%
Lack of Adequate Financial Support for IT	21.00%
Lack of Strategic IT Plan/Failure to Implement IT Plan	12.30%
Lack of Top Management Support for IT	9.90%
Lack of Clinical Leadership	8.60%
Vendor's Inability to Effectively Deliver Product or Service to Our Satisfaction	7.40%
Lack of Staffing Resources	6.20%
Don't Know	3.70%
Difficulty in Achieving End-User Acceptance or Use	2.50%
Other	1.20%
Lack of Common Data Standards	0.00%

Primary IT Decision Maker

Question 11

In your experience, who is the primary IT decision maker in your client's organizations? (Please select only one).

Chief Information Officer	39.00%
Chief Executive Officer	24.40%
Chief Financial Officer	17.10%
Chief Operating Officer	6.10%
Don't Know	6.10%
Chief Medical Officer	4.90%
Board of Directors	1.20%
HIM Director/Medical Records Director	1.20%
Other	0.00%
Chief Nursing Officer	0.00%

IT Applications

Question 12

Please identify the healthcare applications areas that you consider most important for your health care clients over the next two years? (Please select five).

Electronic Medical Record (EMR)	60.20%
Computer-based Practitioner Order Entry (CPOE)	55.40%
Clinical Information Systems	47.00%
Enterprise-wide Clinical Information Sharing	36.10%
Clinical Data Repository	33.70%
Point-of-care Clinical Decision Support	32.50%
Business Intelligence/Decision Support Systems (e.g. Data Warehouse)	31.30%
Digital Picture Archiving and Communications System (PACS)	31.30%
Web-based Applications	27.70%
Bar Coded Medication Management	21.70%
Financial/Administrative Information Systems	20.50%
Enterprise Master Patient Index	18.10%
Ambulatory Systems	13.30%
Supply Chain Management	10.80%
Enterprise Resource Planning Systems (ERP)	9.60%
Customer Relationship Management/Call Center	8.40%
Telemedicine Systems	6.00%
Other	4.80%
Don't Know	0.00%

IT Applications (continued)

Question 13a

Please indicate the technologies that you consider most important for your health care clients now? (Please select all that apply).

High-Speed Networks (LANs, WANs)	53.80%
Data Security Technologies	48.80%
Bar Coding Technology	42.50%
Wireless Information Systems	41.30%
Web-enabled Business Transactions (e-business)	37.50%
Intranet (linking internal users behind a firewall)	36.30%
Handheld Personal Digital Assistants (PDAs)	35.00%
Web-enabled Clinical Processes	26.30%
Extranet (linking external users over a secure connection)	26.30%
Automated Alerts/Paging to Clinicians	26.30%
Data Warehouse	25.00%
Client-Server Systems	23.80%
ASP Services	22.50%
XML (Extensible Markup Language)	20.00%
Thin Clients (e.g. a stripped down PC designed specifically to be a client in a client/server network)	18.80%
CCOW (Visual Integration)	11.30%
Speech Recognition	6.30%
Don't Know	3.80%
Other	2.50%

IT Applications (continued)

Question 13b

Please indicate the technologies that you consider most important for your health care clients *in the next two years?* (Please select all that apply).

Wireless Information Systems	60.30%
Web-enabled Clinical Processes	46.20%
Web-enabled Business Transactions (e-business)	43.60%
Speech Recognition	32.10%
Data Warehouse	30.80%
Handheld Personal Digital Assistants (PDAs)	29.50%
Extranet (linking external users over a secure connection)	29.50%
Data Security Technologies	28.20%
High-Speed Networks (LANs, WANs)	26.90%
ASP Services	23.10%
Bar Coding Technology	19.20%
Automated Alerts/Paging to Clinicians	16.70%
CCOW (Visual Integration)	16.70%
Thin Clients (e.g. a stripped down PC designed specifically to be a client in a client/server network)	15.40%
Intranet (linking internal users behind a firewall)	14.10%
XML (Extensible Markup Language)	14.10%
Client-Server Systems	6.40%
Don't Know	5.10%
Other	2.40%

IT Applications

Question 14a

Which security tools do you feel are the most important to health care organizations in maintaining data integrity *at this time*?

(Please select all that apply).

Firewalls	80.20%
User Access Controls (based on role/location)	71.60%
Disaster Recovery	66.70%
Data Encryption	56.80%
Audit Logs of Each Access to Patient Health Records	51.90%
Single Sign-On	44.40%
Multi-Level Passcodes	43.20%
Electronic Signature	43.20%
Off-site Storage	33.30%
Public Key Infrastructure	13.60%
Biometric Technologies	6.20%
Don't Know	4.90%
None	1.20%
Other	0.00%

Question 14b

Which security tools do you feel are the most important to health care organizations in maintaining data integrity *in the next two years*?

(Please select all that apply).

Biometric Technologies	56.00%
Electronic Signature	48.00%
Data Encryption	46.70%
Disaster Recovery	44.00%
Firewalls	40.00%
User Access Controls (based on role/location)	40.00%
Audit Logs of Each Access to Patient Health Records	38.70%
Single Sign-On	36.00%
Multi-Level Passcodes	26.70%
Public Key Infrastructure	26.70%
Off-site Storage	24.00%
Don't Know	6.70%
None	0.00%
Other	0.00%

IT Staffing

Question 15

Please identify the areas below in which you feel that your clients have the most critical staffing needs. (Please select up to three).

Systems Integration	36.60%
Process/Workflow Design	32.90%
Clinical Champions	23.20%
Network and Architecture Support	22.00%
IT Planning	22.00%
IT Management	22.00%
Clinical Transformation	20.70%
System Design and Implementation	19.50%
Clinical Informaticists	17.10%
Application Support/Development	17.10%
User Training	15.90%
Data Security	15.90%
Regulatory, Reimbursement, and Accreditation Issues (e.g. HIPAA and JCAHO)	8.50%
Help Desk	8.50%
Internet/Intranet	7.30%
Programming	7.30%
PC/Server support	6.10%
Don't Know	6.10%
Other	3.70%
None	0.00%

IT Outsourcing

Question 16

By what percentage do you expect your organization's revenues to change in the next 12 months due to outsourcing on the part of your clients?

Increase by less than 10%	13.40%
Increase by 10 to 20%	23.20%
Increase by more than 20%	30.50%
No Change	18.30%
Decrease by less than 10%	0.00%
Decrease by 10 to 20%	0.00%
Decrease by more than 20%	0.00%
Don't Know	14.60%

IT Outsourcing (continued)

Question 17

In what areas do you expect the increase or decrease of revenues to impact your services?
(Please choose all that apply).

Systems Integration	34.60%
Project Management	30.80%
E-Business	29.50%
Applications Development	26.90%
ASP Services	23.10%
System Installation	21.80%
User Training	19.20%
Don't Know	17.90%
Technical Support	16.70%
Website/Internet (Maintenance/Development)	15.40%
Help Desk	15.40%
Database Management	15.40%
Full IT Department Outsourcing	12.80%
None	11.50%
Interim CIO	11.50%
Network Operations, Monitoring and Support	9.00%
Asset Management	6.40%
PC Support	3.80%
Other	3.80%
Computing Facility	1.30%