

Health

Front and center in the global pandemic, the health industry rapidly advanced its digital journey. Many trends we reported for the last five years accelerated as patients and providers were compelled to engage more digitally. Digital technology will continue to improve the patient and customer experience and support the patient at home — which is the new top business priority this year.

Read on for more insights into health industry executives' top trends and priorities, along with recommendations for key actions they can take now to advance patient/citizen health outcomes.



Priorities align around the patient and customer/citizen experience

After more than a year of battling unprecedented challenges on the front lines, the health industry continues to face daunting demands. As health systems and all parts of the health ecosystem seek to rebalance and find a new normal, they are accelerating the use of digital solutions and data to improve the patient and customer experience.

A renewed focus on virtual care and telemedicine, hospital-at-home programs, and using data to target precision treatment are just a few of the trends in focus for executives at all levels.

The good news is, more health executives than ever say their digital strategies are producing results. Yet, greater digitization and the use and movement of data is increasing the surface for cybersecurity attacks. Protecting data and equipment through cyberprivacy and cybersecurity remains a top concern for health executives.

Each year, we meet with client executives from around the world to get their views on the trends affecting their organizations and industries. Through the CGI Voice of Our Clients, we analyze these findings to provide actionable insights by industry to benchmark best practices, including the attributes of digital leaders. This report summarizes the trends and priorities from our 2021 CGI Voice of Our Clients discussions with 67 health industry executives, along with 4 key attributes of the digital leaders in health.

About the insights

In 2021, we met with 1,695 business and IT executives. This summary shares sample insights from 67 health industry client executives.

Interview demographics

45% Business leaders	55% IT leaders
55% C-level	45% Ops-level

Over the past 6 years through the CGI Voice of Our Clients program, we've held 7,470 client discussions, collecting 1 million data points across the industries and geographies we serve. Our anonymized benchmarking data reflects insights from 5,500 client organizations located in countries representing 82% of the world's IT spend across all economic sectors.

Top trends and priorities

Top trends and priorities for health executives were largely consistent year-over-year, with a growing focus on digital transformation and IT modernization to meet patient and customer/citizen expectations.

Top trends

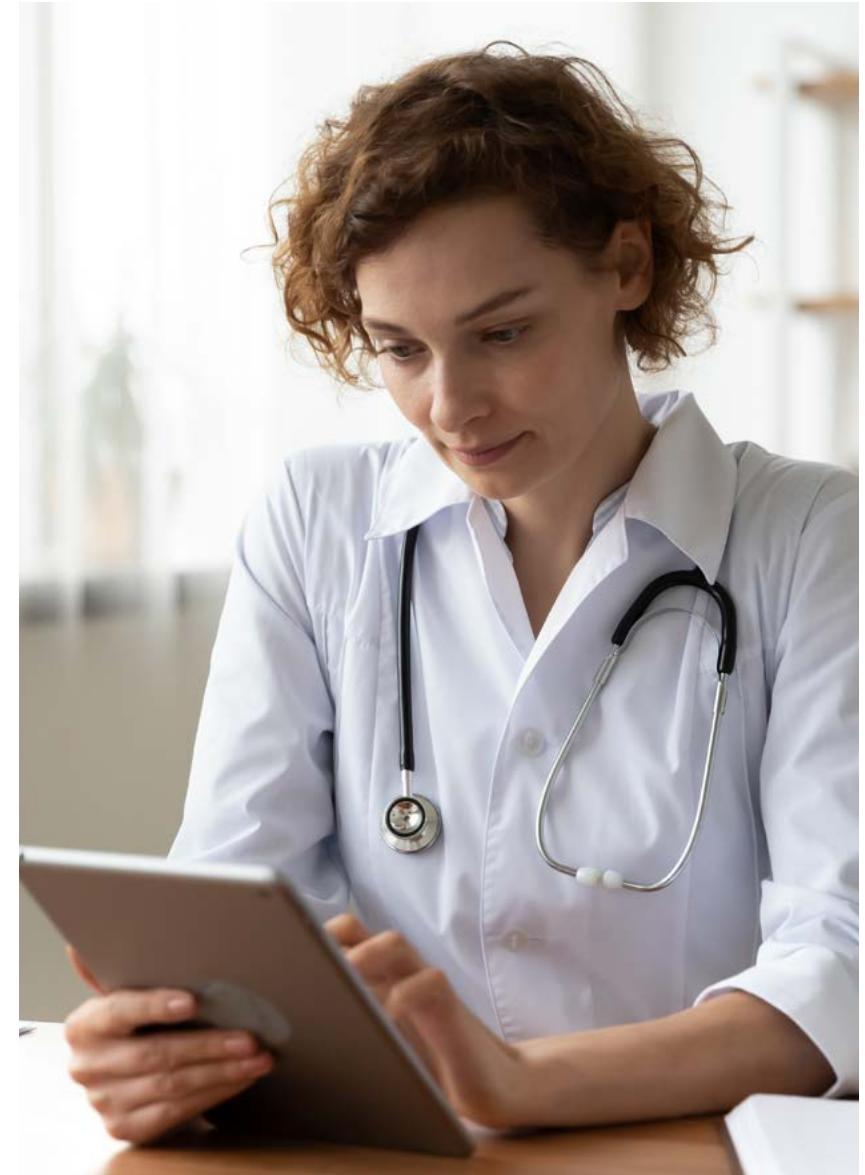
- 1 Becoming digital organizations to meet customer/citizen expectations
- 2 Protecting data and equipment through cyberprivacy and cybersecurity
- 3 Interoperability and standards

Top business priorities

- 1 Improve customer experience through compliance to treatment guidance and supporting the patient at home
- 2 Optimize today's operations
- 3 Collaborate across the boundaries of our organization to deliver interoperability

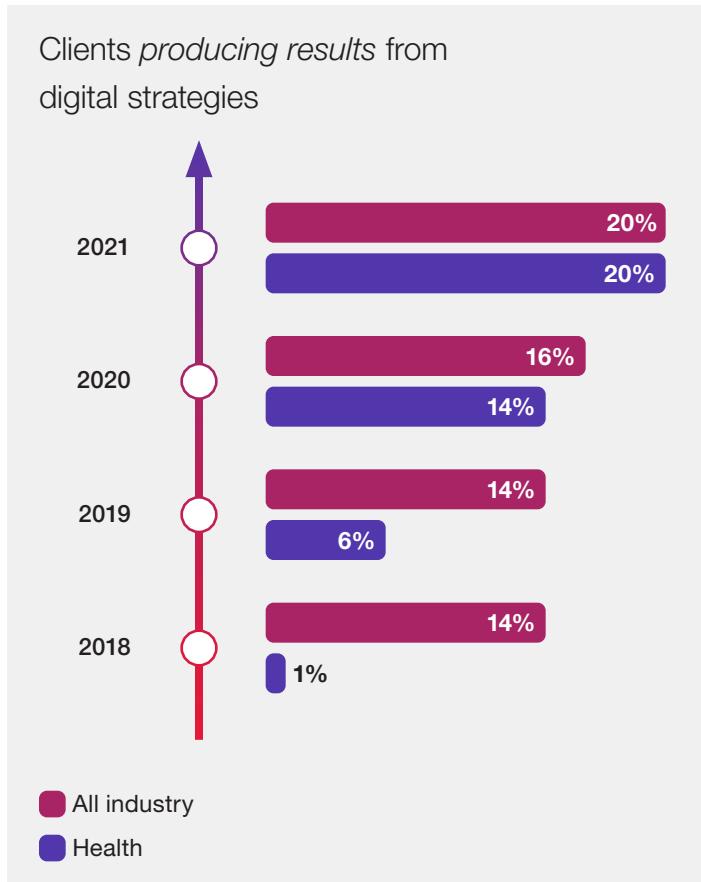
Top IT priorities

- 1 Improve the patient experience and reduce costs by digitizing and automating healthcare
- 2 Drive IT modernization and new IT delivery models
- 3 Digitize and automate business process across and beyond the value chain



Top insights for health

Our 2021 insights from health industry executives reveal significant progress in producing results from digital strategies, as well as a keen focus around improving the patient and customer experience.



1 Significant increase in producing digital results.

20% of health executives say their organizations are producing results from digital strategies — now matching the all-industry average. Progress has risen every year since 2018, when just 1% were seeing results in health, compared to 14% across industries. A larger percentage of hospital executives are seeing results (38%, or 18pp above the industry average).

2 Priorities align on the patient experience.

The top industry trend and business and IT priorities align around a common theme — the patient/citizen. Becoming digital to meet customer/citizen expectations is the top trend, while the top business priority is to improve the customer experience and support the patient at home. Topping the IT priorities is improving the patient experience and reducing costs.

3 Digitization is impacting business models. 58% of executives say digitization is having an impact on their organizations' business model, compared to 46% in 2020 and 38% in 2019.

Top insights for health

4

Efficiency and cost reduction stay in focus. Optimizing operations is the second ranked business priority this year. At the same time, improving the patient experience and reducing costs by digitizing and automating healthcare is the top IT priority.

5

Cybersecurity and privacy remain high priorities.

Protecting data and equipment through cyberprivacy and cybersecurity remains top of mind, ranking as the second top industry trend again in 2021. Protection from cyber threats also ranked among the top IT and business priorities.

6

Awareness of data privacy laws and rules is high.

73% rate their level of awareness of consumer/citizen data privacy laws and regulations within their primary country of operations as high (8–10 on a scale of 1–10, where 10 is high). They say the top action they are taking is identifying, managing or consolidating disparate data sources that contain sensitive data.

7

Ecosystem relies on technology partners.

47% of executives say their primary approach to developing partner ecosystems is to partner with technology companies for platforms and services, and another 15% say their ecosystem model includes this approach.

8

Innovation investment focuses on patient experience, interoperability and data analytics.

Nearly all health executives (81%) say that, over the next 3 years, they plan to invest in improving the patient, customer/citizen and employee experience. 78% say they plan investment in integration and interoperability and 71% say investment will focus on data analytics to support precision medicine and safer care.

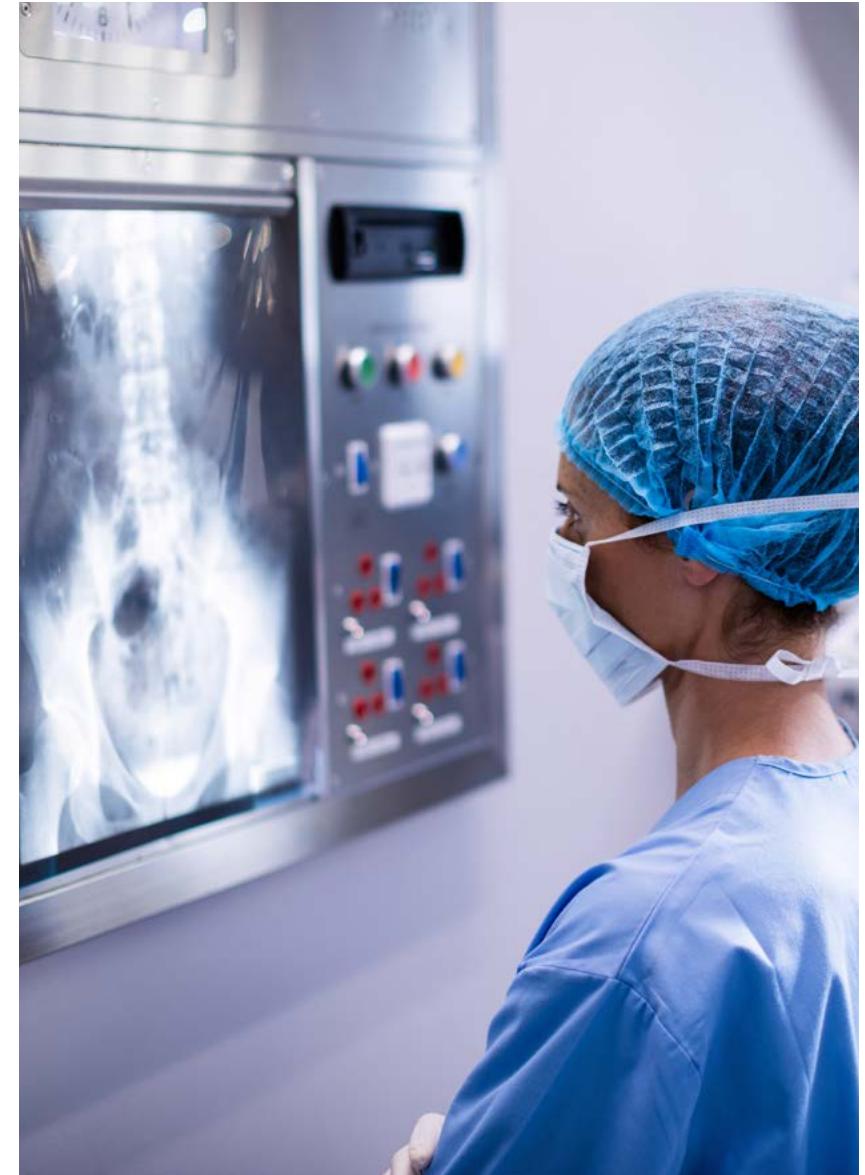


Digital leaders in health

Among health industry executives, 20% indicate accelerated progress, reporting that they are producing results from digitization strategies. Among these digital leaders, some common attributes emerge. This table compares responses to questions from the digital leaders to responses from executives whose organizations are still building or launching digital strategies.

Common attributes of digital leaders	Executives producing results from digital strategies	Executives building or launching digital strategies
Are more sensitive to data privacy laws and regulations	88%	68%
Are more often running a secure IT environment	75%	67%
Better align IT and business priorities	56%	38%
Use managed services and partners more	57%	30%

* 8–10 on scale of 1–10, where 10 is high



7 recommendations for achieving your top priorities

1 Enable data-driven outcomes. Improving the patient/citizen experience means having a holistic picture of the individual to put them truly at the center of the health system. A patient-centered data strategy and tools, such as a trusted data fabric or API gateways, will advance this picture and support the coordination of services to improve both health status and health outcomes. Improving health experiences, outcomes and affordability also requires bringing data from many sources and applying meaningful analytics.

Case in point:

Reducing fraud, waste and abuse in Medicare and Medicaid programs through real-time data sharing

Implementation of the API Gateway — an application programming interface that will aggregate data from multiple source systems — at the U.S. Department of Health and Human Services' Centers for Medicare & Medicaid Services' Center for Program Integrity (CPI) will create a streamlined, data-sharing solution that advances CPI's mission of detecting and combating fraud, waste and abuse in the Medicare and Medicaid programs.

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2 Embed security and privacy. A secure IT environment is essential for 'trust' in the system. Privacy and cybersecurity are fundamental to digital leaders in health. This is expected by the patient and demanded by law and regulation. While the individual is the weakest link and doubling down on training is an appropriate high priority, a holistic view of continuous systems protection, detection and mitigation is essential and complementary.

Case in point:

Assessing security risk gaps for a U.S. healthcare provider

Based on U.S. federal requirements, CGI experts used both NIST and Department of Health and Human Services methodologies to conduct a security risk assessment for a healthcare provider. The team assessed 77 key control identifiers and developed prioritized recommendations to strengthen the provider's compliance posture by developing a more robust information security program.

7 recommendations for achieving your top priorities

- 3 Map out a cloud strategy.** There is clear movement to the cloud by the health industry, which is now adopting cloud solutions in line with other industries. North American health executives are more aggressive in this move than their European counterparts. Mapping out a strategy for application modernization, understanding hybrid cloud options, adopting effective cloud security approaches, and effectively managing these environments become essential to success.
- 5 Improve regulatory reporting.** The health industry is one of the most politically visible and highly regulated industries we serve. Responding to regulatory changes remains an area of focus for health executives again this year. We expect that upcoming regulations will, among other things, highlight the social determinants of health that impact the inequities in healthcare exposed by the pandemic. Effective digital reporting and system alignment are key to compliance.

Case in point:

CGI supports UK Ministry of Defence's digitization of healthcare

The UK Ministry of Defence and CGI have reached a strategic milestone in defining the migration of services to the MOD secure cloud as part of the CORTISONE program. The MOD has contracted with CGI to be a key member of their supplier ecosystem to transition the digital delivery of healthcare for the UK's Armed Forces, while sustaining existing services.

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- 4 Optimize the supply chain.** Supply chain challenges were clearly exposed by the pandemic in many industries. Within health, in particular, our interviews suggest the supply chain has not received the priority it deserves. Lessons from other industries show that end-to-end visibility, sourcing analysis, tracking methodologies and inventory management can enable rapid redistribution in emergencies, strategic sourcing decisions, and savings from better inventory management.
- 6 Integrate the end-to-end value chain.** With all of the advances in virtual health during the pandemic, a key next step is integrating these technologies and workflows into the systems of care so decisions are made with full visibility, encounters are captured and quality is assured.

Case in point:

CGI supports NHS Digital and Ministry of Defence (MOD) sharing of COVID-19 vaccination status for Service personnel

CGI has delivered connectivity between NHS digital systems and MOD medical systems to rapidly enable secure, multi-directional flow of COVID-19 vaccination data for service personnel. The interface enables real-time vaccination records of armed forces personnel and dependents to be accessed from both NHS MOD Defence Medical Services, and MOD human resources systems.

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7 recommendations for achieving your top priorities

7 Improve operational efficiency. Many industries have redesigned services to be more people centered, streamlined, and virtual or self-service. They use data and technology to improve decision-making and productivity, which not only frees up human resources to provide more valuable service, but also enables more engaging and satisfying employee experiences. The health and social care industry can benefit from lessons learned in other industries in using technologies like artificial intelligence, predictive analytics and robotic process automation to optimize operations and improve outcomes.

Cases in point:

Virtual agent helps DynaLIFE deliver COVID-19 testing service

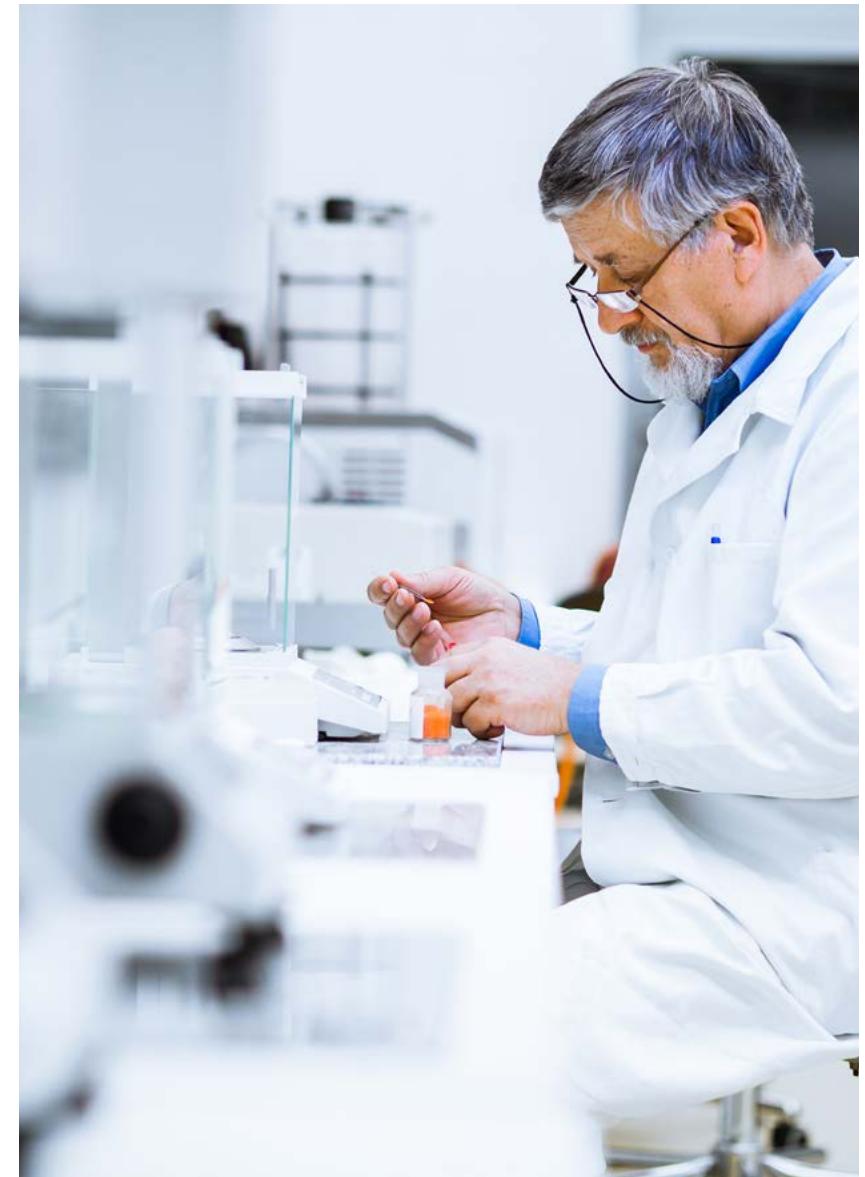
DynaLIFE is a major Canadian medical laboratory offering diagnostic testing services to Albertans. When its new COVID-19 test option for travelers caused a surge in contact center demand, CGI helped alleviate the burden with a conversational chatbot, or virtual agent.

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Enabling rapid delivery of COVID-19 vaccines to nearly 1 million people

Multiple public health agencies and other organizations partnered with CGI to launch a comprehensive, cloud-based solution using the Salesforce platform designed to expedite distribution and administration of approved COVID-19 vaccines for residents of multiple jurisdictions.

[+ Read blog: How automation can improve pandemic response in healthcare](#)



About CGI

Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-based to help accelerate returns on your investments. Across 21 industry sectors in 400 locations worldwide, our 78,000 professionals provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

For a complete set of the CGI Voice of Our Clients industry insights, and to consult with one of our experts, please visit cgi.com/voice-of-our-clients or contact us at info@cgi.com.

