



# 2005 POST-SUMMIT REPORT

Gartner Healthcare Summit 2005  
November 13–16, 2005  
Hyatt Regency Grand Cypress  
Orlando, Florida

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2006

### HEALTHCARE IT & BUSINESS EXECUTIVES

2006 Complimentary Summit Packages now available at "one of the top ten resorts in the world."

➤ See inside for details.

### TECHNOLOGY PROVIDERS

1st Quarter sellout forecasted for November 2006 Sponsorship Opportunities.

➤ Set up your Case Study Sponsorships today.

## A Uniquely Collaborative – And Successful – Healthcare Event

Brings Gartner Analysts, Healthcare Executives and Technology Providers Together

In 2004, Gartner predicted ...

*“By the end of 2005, healthcare organizations that have not begun a dialogue with each other on how to solve shared problems will be unable to make more than incremental progress on patient safety, affordability, and efficiency.” \**

Well, at the end of 2005, over 200 Senior Healthcare IT and Business Executives from 150 healthcare organizations had begun or expanded upon that dialogue at Gartner Healthcare Summit.

Within the collaborative environment that is the hallmark of the unique Gartner Vision Events format, Healthcare IT and Business Executives:

- Received firsthand briefings on the latest research recommendations from the globally-renowned Gartner healthcare analyst team.
- Shared key learnings with colleagues at both healthcare payer and provider organizations during Executive Roundtables, Collaborative Lunch Sessions and other peer-to-peer networking venues.
- Met with leading and emerging Technology Providers in intimate Case Study Presentations to learn about both successful healthcare IT implementations and new innovations.

In this 2nd year of its transition to the collaboration-building Vision Events model, the Summit was declared a success by the invitation-only audience of Senior Healthcare Decision-Makers and the Technology Provider community in attendance.

### Enthusiastic Remarks About the 2005 Gartner Healthcare Summit.

*“Attending the conference is already paying off for Florida Hospital in that we are now in discussion with two vendors who presented. Interestingly, one is an organization we have investigated before and the other provides a product we use. Both have additional products/features of which we were unaware -- features which we are now exploring.”*

Todd Frantz, Florida Hospital CTO

*“This Summit just keeps getting better and better. We’re very pleased with the volume of attendees. The Case Studies are a great forum for us to meet directly with decision-makers and get their feedback.”*

Dennis Schmuland, Microsoft

### New Theme, New Location Announced for 2006 Gartner Healthcare Summit

**“Leveraging Information and  
Technology to Optimize Value”**



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available for Technology Providers  
– these are forecasted to sellout as  
early as end of 1st quarter 2006.

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\* Source: Technology-Enabled Collaboration: Healthcare Payer  
and Provider Touchpoints, Cynthia Burghard, page 5, 11/04

## The Only Event Featuring The Gartner Healthcare Analyst Team

### Moves The Industry Forward With The Summit Theme: “Agility: Unlocking The Potential of Collaborative Healthcare”

Is the term “agile healthcare organization” an oxymoron? Well, it’s true that the healthcare industry is notoriously resistant to changes in information handling and business processes.

But with employers, governments (and eventually, consumers) cranking up the pressure for improvements in healthcare quality, safety, access, satisfaction and efficiency, agility is no longer an ideal – it is essential to healthcare survival.

Therefore, the underlying premise of the analysts’ presentations was the need for IT to sharpen its agility to execute information-rich collaborative processes within and across stakeholder boundaries.

### Where Healthcare IT Should Focus In 2006

- Use Web services to implement service-oriented and event-driven architectures and business process technologies to:
  - Extend the life of legacy systems
  - Properly select new applications
  - Build composite “gap” applications
- Work with business management to ensure that barriers to intra- and extra-organizational collaboration are removed.



### Notable Recommendations from Gartner Analyst Presentations:

#### On RHIOs

“Major healthcare organizations should decide on one of three strategies on RHIOs -- lead, follow or ‘get in the way.’ Letting it form without involvement will create a downstream advantage.”

Wes Rishel and Robert H. Booz  
*IT-Enabled Collaboration: This Time We Really Mean It!*

#### On Healthcare Payers’ Future

“It is time for the industry to become innovative or slowly twist in the wind until organizations from other industries see the opportunity and seize it.”

Joanne Galimi  
*Healthcare Payers’ Crisis: Innovate or Perish*

#### On Achieving Agility in Clinical Processes

“Achieving agility is a stretch for any care delivery organization today. It will not be long, however, before care delivery organizations that do not have the necessary agility capabilities find themselves under significant competitive stress.”

Barry Hieb  
*Using Software Agility to Gain Control of Your Clinical Processes*

#### On What We Can Learn from European Healthcare IT

“Healthcare organizations pursuing a data repository approach to Electronic Health Records should study the efforts of England, Scotland and Sweden. Those pursuing a portal approach should study the efforts of Denmark, the Netherlands, and Lombardy (Italy).”

Jonathan Edwards  
*Healthcare IT: The European View*

#### On E-prescribing

“Some sort of payment to physicians will be required to recruit and sustain physician adoption of e-prescribing.”

Cynthia Burghard and Barbara Kelly  
*E-Prescribing: A Model for Collaboration*

## Enlightening Perspectives From Industry Experts



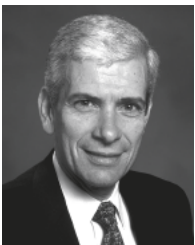
### **Summit Keynote: “The Advent of Information Age Medicine: Inescapable Upheaval and Irreplaceable Opportunity”**

**Michael Millenson**, Author, *The Mervin Shalowitz, MD Visiting Scholar*  
Kellogg School of Management

Michael L. Millenson, author of the critically acclaimed, *Demanding Medical Excellence: Doctors and Accountability in the Information Age*, delivered a riveting keynote presentation at the Summit.

He outlined a compelling case for the need for a fundamental change in the way healthcare is delivered, with disturbing facts such as, “States collectively will spend more on Medicaid in Fiscal Year 2005 than on K-12 education.”

As a result of rising costs and medical error rates, both consumers and employers are demanding greater transparency and information. With physicians in the spotlight, pay for performance will prevail over reputation and value -- and Millenson predicts that healthcare’s “cottage industry will collapse.” What will arise in its place? More evidence-based medicine -- which combines clinical intuition and information management.



### **Collaborative Lunch Session: “The Value of Clinical Information Sharing”**

**John Fallon**, Chief Physician Executive  
Blue Cross Blue Shield of Massachusetts

**John Glaser**, Vice President and CIO  
Partners Healthcare System

Collaboration seems like a worthy ideal, but does it really make a difference. John Fallon and John Glaser gave their perspectives from both sides of the equation -- healthcare insurer and integrated delivery system -- as a result of their involvement in MA-SHARE, a Massachusetts collaboration of payers and providers.

John Fallon began talking about his side of the story commenting on how the current system doesn’t do well with chronic conditions, and how “Everything must change.” He feels the industry is headed in the right direction -- and that as infrastructure is built, “we will learn every step of the way.” Right now, he feels both the ROI and proof of the value of collaboration are still elusive.

John Glaser discussed the challenges of putting together a regional collaboration -- commenting that “some regions are too dysfunctional” to collaborate. However, in the more successful case of MA-SHARE, he shared the following lessons. There must be a shared gain among all participants -- and a high degree of interdependence in achieving that gain; data exchange must be seen as a commodity; a minimally invasive approach must be taken; the focus should be on collaboration efficiencies; and most of all, he cautioned to “keep it simple.”

## **Notable Recommendations from Gartner Analyst Presentations:**

### **On Disaster Recovery**

“By 2008, most major clinical system vendors will offer disaster recovery services for their own products, allied systems and possibly some of their competitors. (0.8 probability).”

Barry Runyon  
*Disaster Recovery: The Challenges of Safety, Availability, and Affordability*

### **On Security**

“By 2008, information security spending will decrease as HCOs improve their overall security management, converge on fewer security vendors and improve incident response efficiency. (0.8)”

Barry Runyon  
*Hospitals and Healthcare Security: What is Reasonable and Appropriate*

### **On Business Performance Metrics**

“Business performance metrics must follow enterprise strategy ... This means that “best practices” should not be measured externally, but instead should be derived from the strategical goals and tactical implementation of those goals.”

Robert Booz  
*Using Business Metrics to Drive Meaningful Change*

### **On Business Intelligence**

“By 2008, investment in BI will increase by at least 30% and become one of the top priorities of payers in life, health, and property and casualty insurance (0.7 probability).”

Joanne Galimi  
*Business Intelligence and Information Management: The Key Requirements for a Collaborative Information Environment*

### **On Pay for Performance**

“In 2005 and beyond, payers that invest in pay for performance as another cost management strategy with penalties for underperformance will be unable to recruit more than 5% provider participation.”

Cynthia Burghard and Violet Shaffer  
*Pay for Performance: Conflict or Collaboration*

## Sponsor Highlights

- Sponsorship Doubles for 2005 Summit
- 1st Quarter Sellout Forecasted for 2006

The Summit, with its winning Gartner Vision Events format, brought together an invitation-only audience of Senior IT and Business Executives from healthcare payer and provider organizations to meet with the world's leading IT Vendors.

The hallmarks of the Vision Events experience -- intimate Case Study Presentations, One-on-One Meetings, and premier networking opportunities -- allowed Technology Providers to establish new alliances and build relationships with key decision-makers in a more focused way than offered at other events.

And already -- although the 2006 Summit is not until next November -- Gartner is forecasting a sellout of popular Case Study sponsorships by as early as the end of the 1st Quarter.

### 2005 Summit Statistics

- **Over 200 Senior Healthcare IT and Business Executives from 120 payer and provider organizations**, including 35 IT Executives from the U.S. Army
- **50 Sponsor Vendor Companies** -- double the number from the previous year when the Summit transitioned to the Vision Events format

### Summit Attendee Survey Reveals IT Buying Patterns

- 100% are involved in IT budgets
- 66% of those involved in IT-related purchasing decisions are CIO/CFOs and Executives
- 65% attend Events to build "short lists" of Technology Providers
- 51% come to evaluate and learn about Technology Providers and new technologies
- 40% are interested in learning about latest trends and best practices

### IT Professionals Check With Gartner First Before Making Major Purchasing Decisions

Gartner Events attract an extremely targeted and influential group of more than 37,000 technology professionals with the need, authority, and buying power to implement major IT initiatives.

- 60% of the Fortune 1000 and 80% of the Global 500 support their key technology decisions with Gartner insight and support
- 90% of Gartner Event participants say that "evaluating new products and services" are their top objectives for attending
- 95% are involved with budgets
- More than 70% have IT budgets of more than \$11 million

*"Lots of good contacts – the Summit brings in all the right people. This is our first time as a sponsor – but it won't be our last!"*

*Christopher Click,  
Senior Director of Marketing, Inner Wireless*



More Healthcare IT and Business Executives go to Gartner Events than from any other vertical industry.

**Complimentary Summit Packages** available for qualified Healthcare IT and Business Executives. Complete an online application at [www.healthcareitsummit.com/surveyform.html](http://www.healthcareitsummit.com/surveyform.html)

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Now that these Healthcare IT Decision-Makers have their own Gartner Healthcare Summit, the world's leading Technology Providers are playing a leading role in sponsoring it.

Profit by signing on for a Case Study Sponsorship now – before the forecasted 1st Quarter sell-out.

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## 2005 IT Executives' Choice Awards

### Healthcare IT and Business Executives Vote for The Best Technology Providers

Over 200 CIOs and senior business executives from 150 healthcare payer and provider organizations made their voices heard at the 7th Annual Gartner Healthcare Summit, held in Orlando, Florida from November 13 – 16, 2005 at the Hyatt Regency Grand Cypress.

Four leading Technology Providers were chosen and honored as winners of the IT Executives' Choice Awards at a ceremony held on November 14, 2005.

"The healthcare industry has become the next big global target for IT transformation," said Charles Badoian, event director for Gartner Healthcare Summit, "So naturally, the IT Executives' Choice Awards are highly valued by all Summit participants."

And the winners are ....

**perotsystems®**

**Best Case Study Presentation**  
PEROT SYSTEMS

**IBM®**

**Best New Technology**  
IBM CORPORATION

**IBM®**

**Most Innovative Presentation**  
IBM CORPORATION

**accenture**  
*High performance. Delivered.*

**Best Demonstration of Value/ROI**  
ACCENTURE

**mobileaccess**  
Networks

**Solution with the Greatest Market Potential**  
MOBILEACCESS NETWORKS

The 200 pre-qualified delegates who attended Gartner Healthcare Summit completed confidential ballots to select Technology Providers for the Awards after previewing and learning about new technologies and products in private Case Study Presentations.

### Notable Recommendations from Gartner Analyst Presentations:

#### On Outsourcing

Healthcare insurance companies that do not develop a sourcing management competency by 2008 will be unprofitable or an acquisition target by 2010 (0.7% probability)

John Lovelock  
*Outsourcing in Healthcare: Where Can You Get The Help You Need?*

#### On Physician Office Technology

"Access to EMR technology will be the No. 1 driver of independent physician office participation in RHIOs by year-end 2006 (0.8 probability)"

Barbara Kelly  
*Ambulatory Care: Finally Getting the Attention It Deserves*

#### On Mobile Devices

"Focus on tactical investment in mobile and wireless technology during the next three to five years, as standards and capabilities are evolving rapidly."

Delia MacMillan  
*The Mobile Scenario: Going Beyond Mobile Workforce Enablement*

#### Consumer-Directed Health Plans

"Employees will initially embrace the consumer-based products, but that acceptance will fade by 2010 (0.8 probability)"

Robert Booz  
*The Consumer-Directed Health Plan: Integration, Integration, Integration*

#### On Application Integration

"Companies should add an Enterprise Service Bus (ESB) to their IT strategic plan and application architecture, and selectively deploy ESBs during 2005 through 2007."

Jess Thompson and Wes Rishel  
*Application Integration: Moving Toward an Agile Enterprise*

## Just Announced: 2006 Summit Theme and Research Agenda

### “Leveraging Information and Technology to Optimize Value”

This year's Summit theme “Leveraging Information and Technology to Optimize Value” and our analysts' 2006 presentations reflect the healthcare industry's most immediate IT and business imperatives:

- Information Management
- Evidence Based Medicine
- Data Retention
- Customer Relationship Management
- Ambulatory Care
- Business Intelligence
- Workflow/Business Process Management
- IT Services Market Landscape
- Revenue Cycle Management
- Global Technology Initiatives
- Care Management
- Clinical Systems
- RHIOs and US NHIN

### **Gartner Predicts: Healthcare Provider IT will be the fastest growing global vertical through 2008.**

Get Gartner 2006 Recommendations on how to spend your IT budget wisely

The good news is that healthcare provider IT budgets are finally growing.

But that doesn't mean you can afford to over-invest in the wrong areas or under-fund your true priorities. Your healthcare organization most likely has a huge pent-up demand for multiple IT initiatives and that is going to require careful decision-making on your part.

That's why more Healthcare IT and Business Executives go to Gartner Events than from any other vertical industry -- to get actionable advice on the best technologies to invest in now to improve enterprise agility.

And why Gartner Healthcare Summit is now the must-attend Healthcare IT and Business Event for senior decision-makers looking to plot their strategy for the upcoming year.



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