



# GLOBAL HEALTHCARE SURVEY REPORT

A new era of patient experience



Many healthcare organizations are built on a complex ecosystem of legacy infrastructures, systems and technologies, often operating in departmental silos, without the ability to work seamlessly together or plug into other applications, as necessary. Hospitals rely on their ability to extract, analyze and operationalize data, but system complexity often gets in the way, meaning that valuable, highly trained staff are forced to act as the glue between systems in order to keep things moving.

As a result, clinical and administrative staff have less time to spend on patient engagement, while patient pathways and processing are unnecessarily elongated. **This has a serious impact on the patient experience as well as on hardworking staff.**

Whether healthcare organizations are for-profit or not-for-profit, success is measured by the successful delivery of services. **New ways of working, processing, and interacting with patients are needed to effect real, sustainable improvements for healthcare organizations, their people and their patients.**



Source: IDC Future of Work Survey 2020, European Healthcare sample

## Intelligent automation as an enabler of change

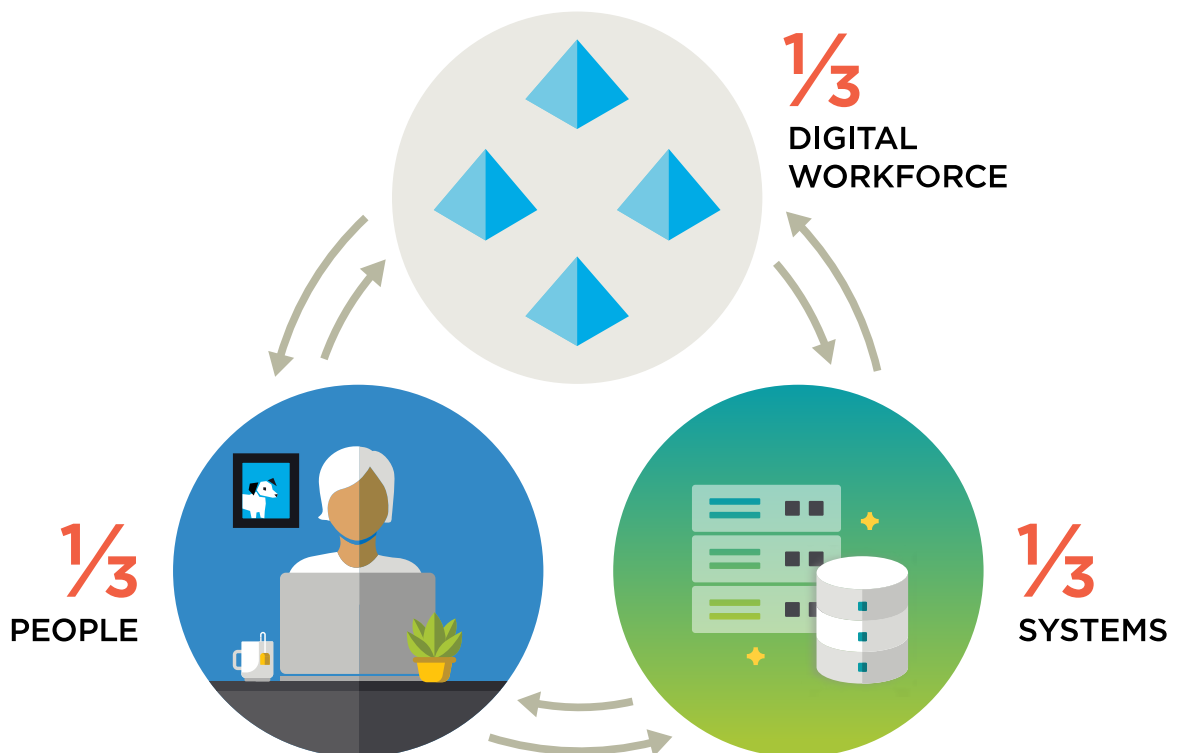
The solution to the challenges that healthcare organizations face across the world is to **do more for patients with the same resources or less**. Improving the patient experience is dependent on enabling more effective, streamlined patient pathways. Central to this is cutting wait times, making care more transparent and giving clinicians more time to spend with patients.

To achieve this, services must be delivered in much smarter ways, and faster and more efficiently than ever before. Intelligent automation enables healthcare organizations to bring in digital workers—software designed to model human roles—to execute rule-based tasks such as appointment bookings and referrals.

We believe that organizations in healthcare and other sector are evolving into three essential and powerful components: one-third people, one-third systems and one-third digital workforce. To understand how far healthcare organizations have evolved towards this model, we undertook global research with 400 senior level respondents, split evenly between Europe, the Middle East and Africa (EMEA), Asia-Pacific (APAC), North America and the UK.

This paper explains what intelligent automation is, the benefits it delivers to healthcare organizations, how it is freeing up humans to undertake more meaningful work for patients and how change is predicted to continue in the future.

Trained and run by the business user via a customizable user-interface, digital workers perform collaborative, data-driven, end-to-end work across a typical healthcare operating environment made up of multiple operating environments with complex, disjointed, and difficult-to-modify legacy systems and manual workflows, at unprecedented speed, accuracy and integrity, 24x7.



## Research findings: Automation already proving its value in healthcare

The use of automation is not a completely new phenomenon in the industry. Electronic patient records and booking systems have been used by providers to improve the service they deliver to patients for many years. However, the problem has been that such healthcare systems, such as scanning, are not easily integrated with each other or with other technologies, putting roadblocks in the way of a truly seamless service.

Nevertheless, the adoption of automated processes in the global healthcare industry has grown steadily over the past five years, from **53% of professionals saying they were moderate or heavy users of automation five years ago to 74% today**. Only 8% of respondents described the level of automation in their role today as non-existent, compared to 21% five years ago.

Mass General Brigham has over 80,000 employees and runs 13 hospitals. Its director of Intelligent Automation Benjamin Berkowitz says that automation began as a way to improve the productivity of the

revenue cycle operations team, where “a lot of really smart people here that understand health care were doing really menial tasks. I thought, there’s got to be a better way for us to do the work that we do”. The program has since expanded into human resources, finance and beyond, and 35 different automations have been introduced, leading to \$10 million in savings over 18 months. Just two digital workers are doing the work of 130 humans, which means the hospital can achieve more without having to expand its workforce.]

Tune in to the full webinar  
with Mass General Brigham

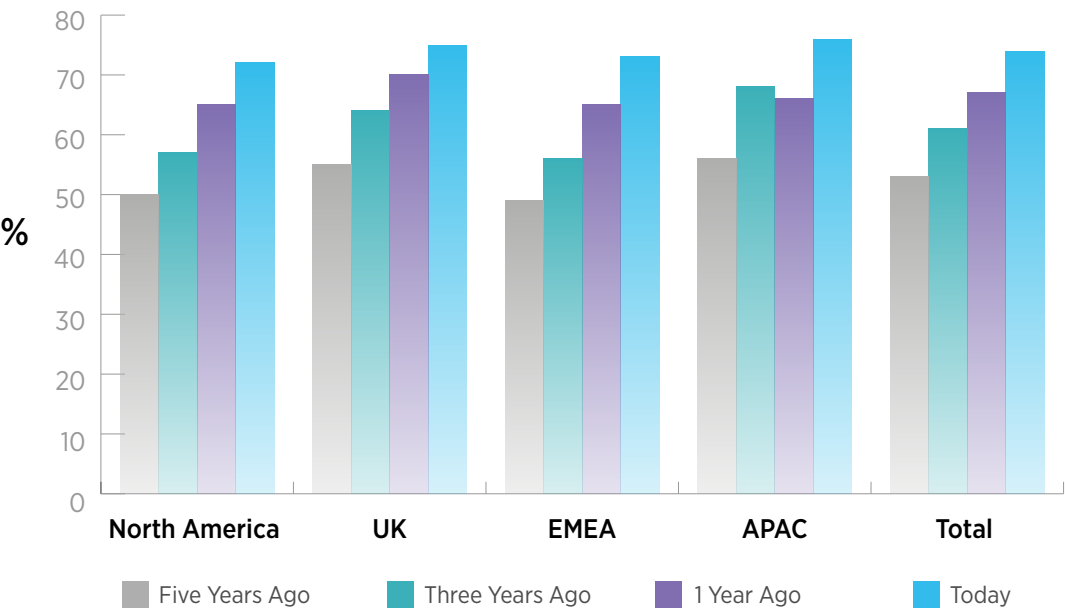
Mass General Brigham saves \$10  
million with intelligent automation

For many organizations, the  
pandemic has accelerated the  
digital transformation journey

While healthcare organizations say that their adoption of automation has grown, many report that the impact of the COVID-19 pandemic propelled them to achieve more in months than they had in the previous few years. Necessity truly was the mother of invention in the crisis, with hospitals reorganizing resources and building layouts, moving consultations online and, in some cases, adapting non-medical facilities to deliver care to those who needed it.

In fact, **the majority (93%) of healthcare organizations report an acceleration in their plans for digitalization because of the COVID-19 pandemic.** In common with other industry sectors, organizations have fast-forwarded their use of digital

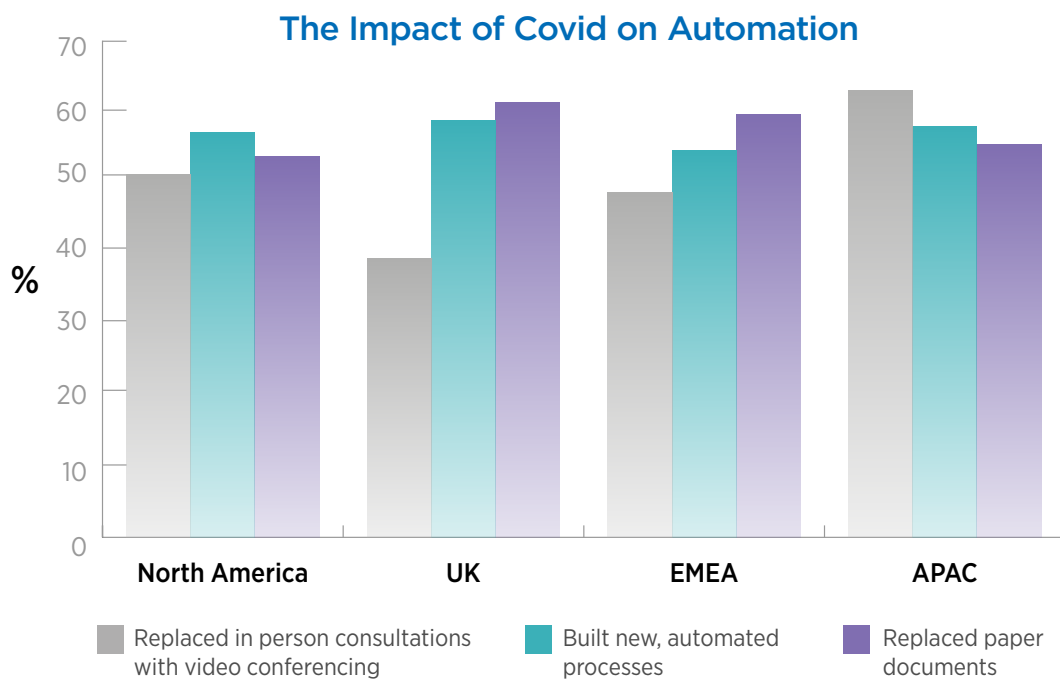
Changes in Levels of Automation in Day-to-day Roles (Moderate or Heavy)



Source: Blue Prism Global Healthcare Survey 2021

technologies, with 58% replacing paper documents with electronic equivalents, and 57% taking the opportunity to build new, automated processes that improve the way they interact with patients and other departments. Almost half (45%) have replaced in-person consultations with video conferencing, a practice that is likely to continue in the years ahead.

Thanks to the loosened procurement frameworks that existed during the pandemic, organizations were also able to respond to growing and increasingly complex healthcare challenges, which includes siloed automation technologies, using automation to join these up and get them working as well-oiled machines. This will likely remain a useful approach well into the future.



Source: Blue Prism Global Healthcare Survey 2021

**A quarter of UK doctors said that on any given day 10-20% of new patients didn't need to attend an outpatient clinic; and 28% said that 10-20% of their follow-up patients could have been seen using an alternative to face-to-face consultation.**

Source: The Royal College of Physicians

**“Everybody’s waking up to learn that there are other ways of delivering service and care. So I think that the pandemic has catalyzed people to look at alternative solutions that they knew were present, but they were just inertial about employing in the past.”**

— DR DAVID MENDELSON, Associate CMIO Mount Sinai Doctors Faculty Practice;  
Vice Chair Radiology IT-The Mount Sinai Health System; Co-Chair IHEJ at Blue Prism World 2020



### **NUHS uses digital workers to meet unexpected demand**

Based in Singapore, the National University Health System (NUHS) is an academic health system comprising a network of institutions that includes hospitals, national specialty centers and polyclinics. When the COVID-19 pandemic hit, NUHS had to ramp up to meet the increased demand on its services. It needed to conduct and register up to 1,000 swab tests per day primarily migrant worker dormitories, where NUHS was providing healthcare support. Using digital workers, NUHS reduced test registration time from two minutes to 30 seconds per test, saving the NUHS 18 work hours every day. By tasking digital workers with result registration, employees are given more time to deliver vital frontline patient care.

[Read the full case study here](#)

## **Healthcare teams ready for more automation**

**Fear of automation as the end of human jobs has been replaced by optimism for humans performing rewarding and valuable work.** From our work with healthcare organizations worldwide, we see that the adoption of intelligent automation has historically moved through discrete phases, from reducing friction and costs in existing processes to providing the basis of completely new ways of interacting with customers and colleagues.

Interestingly, when asked what the biggest roadblocks are to further digitization, the biggest problem was seen as ‘cultural adoption,’ by 36% of respondents. This figure was higher for C-suite respondents (39%) than for directors (36%) and senior managers (34%), suggesting that senior leaders may be somewhat out of step with the needs and expectations of their more junior colleagues. The fact that 97% expect to see growth in automation in the next five shows that cultural adoption may not be the barrier to adoption that it’s perceived to be.

**There are 700 vendors of Electronic Health Record systems used in the USA that don’t talk to each other, meaning providers still routinely resort to transferring data by hand or fax. 1 in 5 patients have noticed an error in their electronic data and nearly half are concerned it may negatively affect care.**

**97% of respondents expect to see more automated processes at the organization they work for in the coming five years. Only 2% of respondents say that automation is not part of their digital roadmap.**

## Benefits of automation not found in silos

While healthcare organizations can derive value from automating standalone processes, the real benefits come from taking an overall view of the institution and questioning whether it could reshape how it operates, particularly in how data can be standardized and shared across collaborative workflows. The aim is always to reduce friction within processes so that services are delivered more efficiently and effectively.

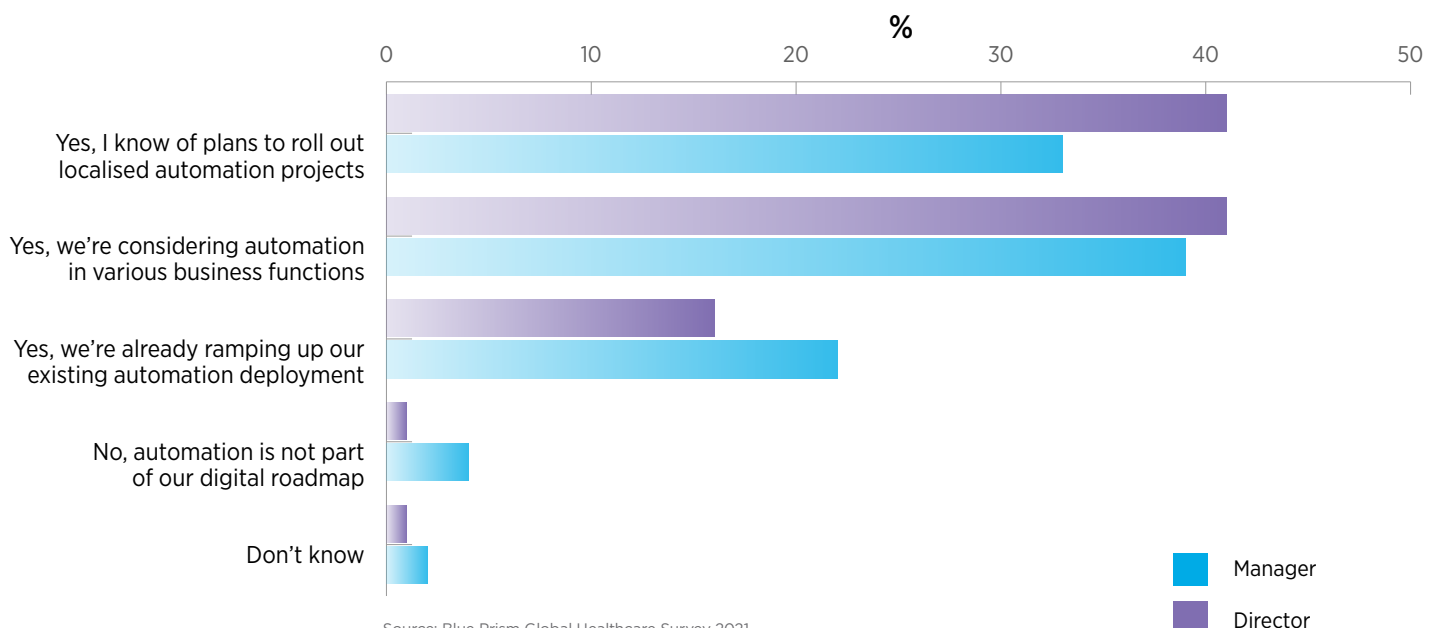


### Kettering General Hospital releases staff time back to patient care

During the Covid-19 Pandemic, each UK hospital had to create a daily COVID Situational Report, which spans multiple departments across the hospital. Kettering General Hospital decided it would be an ideal process to automate because of the importance of the report, the need for zero errors and the time intensive nature of it. A digital worker accesses the HR system and reports on the staff absence records across the hospital related and unrelated to COVID-19. The process of collecting data associated with COVID-19 patient data from the hospital incident room and patient admin systems has also been automated. The data automatically populates the SitRep template and alerts a member of the Health Intelligence team to verify and upload it to the NHS England portal, saving significant amounts of time and resources.

[Read the full case study here](#)

## Anticipation of Automation at Director and Manager Level



# Giving healthcare organizations a new lease of life

One of the key benefits of intelligent automation is that it frees up valuable time that can be given back to medical professionals that can be used to deliver care to patients. It's a source of continuous frustration for staff that they need to devote so many hours to paperwork and reporting, often having to re-enter data for separate siloed systems and chase diagnostic documents that could be accessed online through an automated system.

When asked how respondents would spend their extra time if 50% of the work they currently undertake could be automated, they indicated that the leading activity would be using data analytics to uncover problems or bottlenecks within their processes (58%). An increase in face-to-face time talking to patients about their care and treatments (48%) would be the second most popular activity, followed by the use of data analytics to understand the bigger picture for population health (46%) and collaboration with other departments and care providers to create joint care plans (39%).

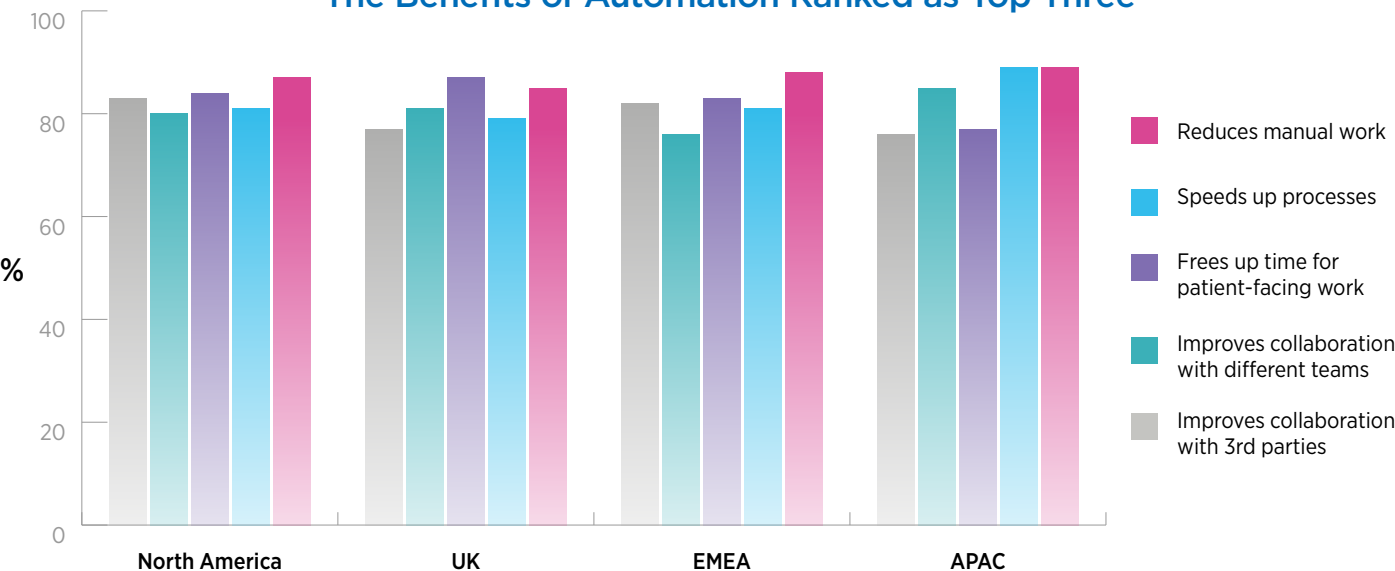


## Royal Surrey NHS Foundation Trust is taking steps to improve its outpatient services.

As with many healthcare organizations, operations were previously constrained by inconsistent processes, poor data quality and a lack of systems integration, with staff performing time-consuming, high-volume, manual tasks to fill the gaps. SS&C Blue Prism's digital workforce is now working with staff members to automate key processes that include diagnostic tracking, appointment cancellations, referrals and attachments from eRS and self-referrals. Wide-ranging benefits are expected, including improved patient outcomes, reduced clinical risk and far less waste.

[Read the full case study here](#)

The Benefits of Automation Ranked as Top Three



Source: Blue Prism Global Healthcare Survey 2021



**“We’ve enabled referrers and patients to book their scan or interventional service with us online. We’re actually the first radiology provider in New Zealand that offers a service like this.”**

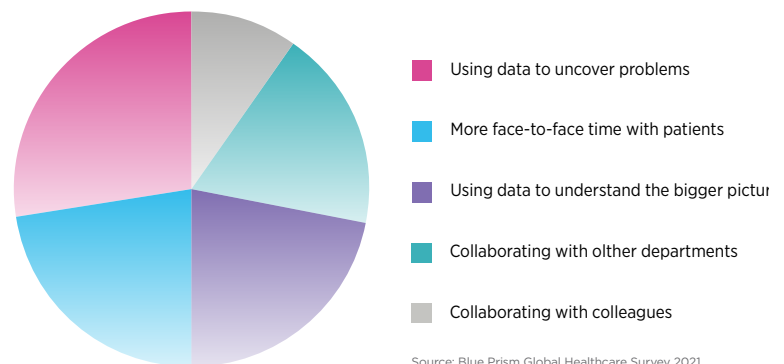
— DR LLOYD MCCANN, CEO and Head of Digital Health, Mercy Radiology

## Acknowledging the barriers and making the most of what you’ve got

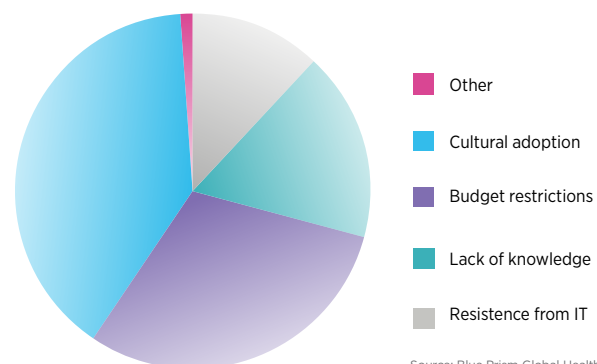
It’s not surprising that the **greatest barrier to a positive patient experience was seen as legacy systems and infrastructure slowing down processes**. This was selected as the top issue by nearly one-third (32%) of respondents and placed in the top three for nearly two-thirds (65%). Other major barriers include long waiting times for appointments or referrals (ranked top by 19%), understanding payment responsibility (18%), a lack of digital services (14%) and long hospital waiting times (10%). A lack of combined services between primary, acute and secondary care was seen as the least significant barrier (7%).

As mentioned earlier in this report, health informatics isn’t new, and the last thing many organizations want to contemplate is wholesale system replacement. Using intelligent automation to join the dots, healthcare organizations have the opportunity to use the systems and data they already have to provide a better service for patients and to reduce manual work for practitioners. The growing number of successful use cases show how automation is already adding significant value to organizations operating all over the world.

### What would respondents do if more of their day-to-day jobs were automated?



### Roadblocks to automation (c-suite respondents)



C-suite

## Conclusion

Pressure on finances, along with the enormous stresses experienced during the pandemic have put a strain on healthcare organizations across the globe. Intelligent automation has matured at the perfect time for a healthcare industry that needs to improve its ability to adapt, strengthen its overall resilience and improve the quality of the experience it offers to patients.

Global healthcare organizations are on an exciting automation journey to increase patient satisfaction and streamline time-consuming outpatient care activities. But they'll need to achieve this in a climate of constant change and ever-evolving demands, and with increasingly constrained and disconnected resources.

Now is the time for healthcare organizations to reevaluate ways of working better by applying the most advanced, trusted intelligent automation capabilities. By implementing a digital workforce—one that works collaboratively with their human workforce—healthcare organizations will introduce a new type of connected enterprise, across the patient lifecycle, where information flows freely across front- and back-office functions and between patient and treatment providers.

Using intelligent automation enables healthcare organizations to standardize processes across departments and services and enable central governance principles. If the need for a similar process emerges elsewhere, they can reuse automation objects to quickly spin up a new process, safe in the assurance that it fits within their governance framework.



Look out for further editions in our SS&C Blue Prism Global Healthcare Survey Report series. We'll be focusing in on regional and sub-sector findings that show how intelligent automation improves the patient experience and why the healthcare industry is set to continue changing over the coming years.

We welcome your feedback on the series and encourage you to contact us at [healthcare@blueprism.com](mailto:healthcare@blueprism.com) with any questions and comments you may have.

### METHODOLOGY

This report is based on independent research undertaken with a total of 400 senior level healthcare professionals across EMEA, APAC, North America and the UK by PollRight, between the 16th and 27th of April 2021. Please note that some percentages may not add up to 100% due to rounding and excludes 'I don't know' responses from the analysis.

**Start your digital transformation journey by speaking with one of our intelligent automation experts. Click below and please indicate your industry or area of interest so we can best assist you.**

**Get Started**

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