

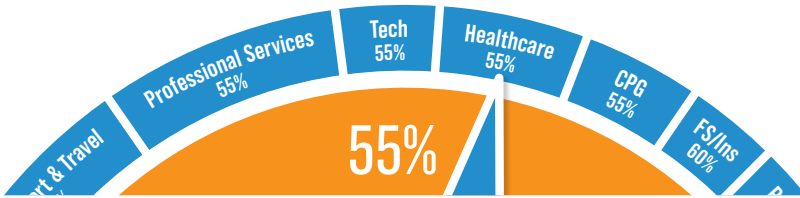
# DIGITAL PULSE— HEALTHCARE

*“Functional Silos and Organizational Inertia are barriers to Healthcare’s adoption of Digital.”*

Healthcare sits in the middle of the disruption barometer, clustered with Business and Professional Services, Consumer Packaged Goods and Technology. While more than half of Healthcare executives foresee major digital disruption in the coming year, very few could definitively say that their organization has the right people. When asked “Do you have the right people to define your digital strategy?” only 23% agreed, with 25% disagreeing. The CEO (32%) and CMO (31%) are roughly equal when it comes to owning digital in Healthcare, with most Healthcare organizations shaping digital efforts around a centralized organizational structure. This system could be directly contributing to one of healthcare’s largest barriers to digital success: Functional Silos. This, when combined with the desire for a focused digital leader, which exists only in 7% of organizations, and a greater sense of Organizational Inertia than in other sectors, Healthcare is being held back by leadership and organizational constraints.

## Digital Disruption Barometer

Healthcare sits directly in the middle of the disruption barometer along with the Business and Professional Services, Consumer Packaged Goods and Technology sectors.

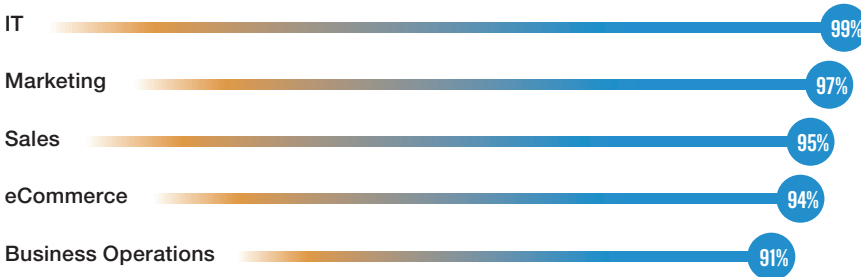


55% of Healthcare executives surveyed responded that their business would be moderately or massively disrupted by digital in the next 12 months.

## Five Functions Most Impacted by Digital

Healthcare executives expect digital to have a sweeping impact across tech-minded and customer-facing functions.

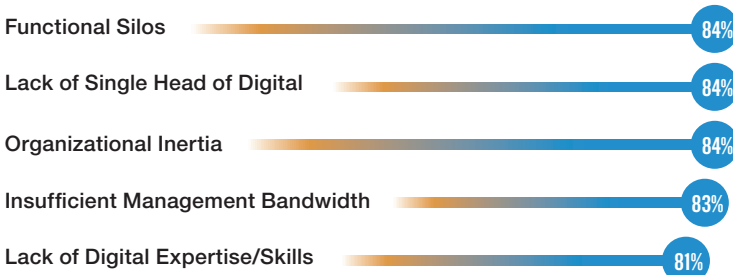
Percentage of Healthcare Executives: Functions Most Impacted by Digital in the Next 12 Months



## Five Top Barriers to Effective Digital Business

When asked what the biggest barriers to effective digital business are, Healthcare executives emphasized challenges related to skills, leadership and organizational structure.

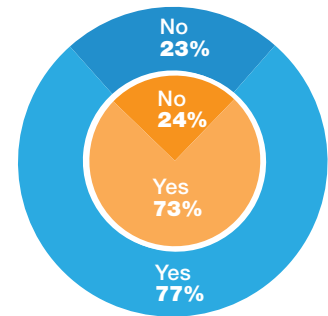
Percentage of Healthcare Executives Rating Barriers as of High or Moderate Significance



## Structure and Strategy

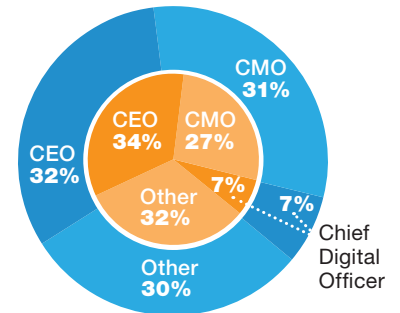
Does your company have a digital strategy?

● Healthcare  
● Total



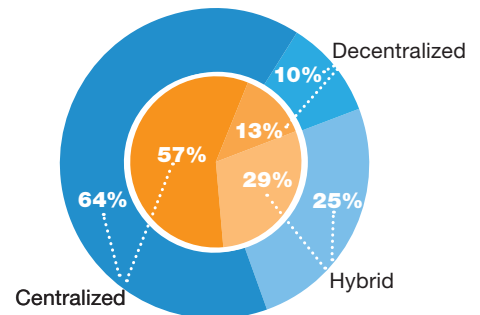
Who owns digital in your organization?

● Healthcare  
● Total



How is digital organized in your organization?

● Healthcare  
● Total

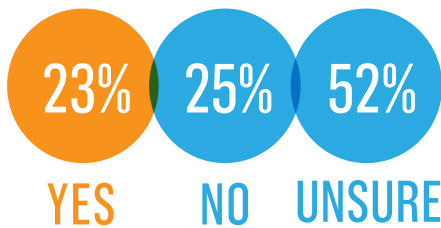


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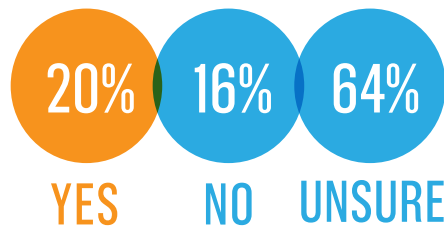
## The People Challenge of Digital

People are the driver of digital in an organization. The below shows how many Healthcare executives agreed and disagreed with two key questions.

*Do you have the right people to define your digital strategy?*



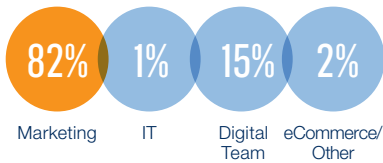
*Do you have the right people to execute your digital strategy?*



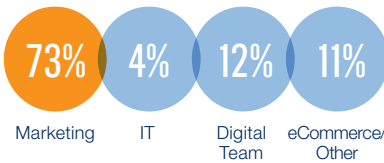
## Ownership of Digital within Organizations

Across organizations, various elements of digital are owned by different parts of the organization. The below shows the percentage of functions that own specific elements of digital in respondent organizations. While Marketing often was cited as an owner, the data demonstrate that little consensus has emerged across Healthcare organizations as digital's logical home(s).

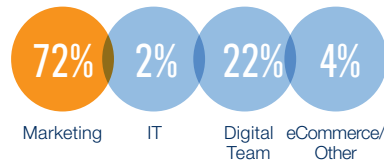
### Social Media Marketing



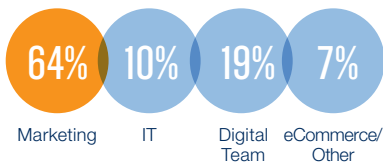
### Customer Mobile App Development



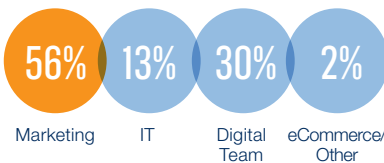
### Digital Media Selection



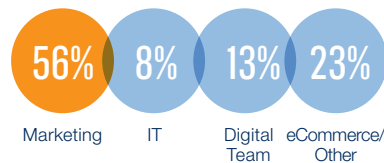
### Social Media CRM



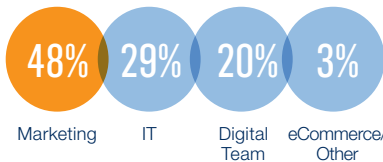
### Customer Experience Strategy



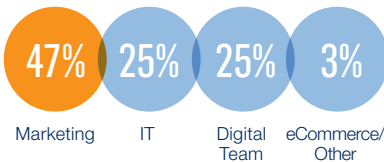
### Vendor Selection



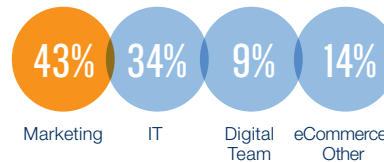
### Customer Analytics



### Web Design

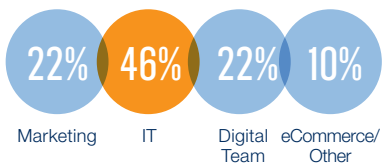


### Employee Digital Engagement

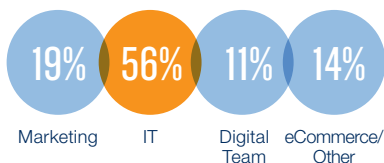


Notable exceptions include **Web Strategy** and **CRM**, which most often are owned by IT.

### Web Strategy



### CRM



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