

REPORT

2022 DigiM™ Digital Maturity Momentum Awards

Results and analysis of Damo's inaugural
digital maturity awards program



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Foreword

Our inaugural DigiM™ Digital Maturity Momentum Awards program received an overwhelming response from health systems looking to conduct a self-assessment and compare themselves against their peers in digital transformation progress.

The nine finalists and awardees in our inaugural program have reaffirmed the significant momentum for digital transformation today at health systems. These leaders are embracing digital transformation wholeheartedly and are making remarkable progress with their transformation programs. We couldn't be more pleased to name **Geisinger**, **Providence** and **Northwell** as the overall leaders in digital transformation strategy and execution for 2022. They have set the pace for the rest of the industry. Their digital health leaders have gained recognition as industry thought leaders and expert practitioners who are forging a path forward that many other organizations are using as a reference for their own journeys.

The Honor Roll, which includes six other health systems, are close behind the leaders with their digital programs. Some have demonstrated excellence in individual transformation tracks – **Intermountain** for patient and consumer-focused digital, and **Sentara** for technology and innovation adoption. Smaller health systems, such as **Virtua** and **MediSys**, are also demonstrating that it is possible to make progress even without the scale and resources of the larger health systems.

The governance model for digital transformation continues to evolve. In the most advanced organizations, we find CIO's, Chief Digital Officers and other senior leaders working collaboratively to advance digital transformation for their enterprises. In our conversations, we have learned that there is a unanimous agreement that digital is not about technology, although technology is the key enabler for digital transformation. These organizations are driving digital programs for addressing access to care and virtual care delivery, while investing in technology infrastructure modernization, especially through cloud migration, automation and CRM technologies. They are also investing in advanced analytics and AI with the twin purpose of targeted interventions and improving patient experiences. Many organizations are yet to formalize digital governance, and in many cases, digital is not yet a function that reports up directly into the CEO, reflecting the range of maturity with digital across the sector.

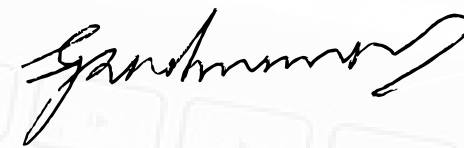
In the current year, digital health programs are under scrutiny for ROI and demonstrable benefits, reflecting the financial strains that health systems are under. The leading organizations have robust metrics programs in place to capture and communicate benefits from digital health investments. In some cases, "soft" benefits are also

being captured. An example is the use of chatbots to decant in-bound queries from call centers for standard self-help such as COVID-19 screening. Another is cloud migration programs that refer to intangible benefits such as reliability and scalability in infrastructure operations.

In the coming year, we anticipate an acceleration of digital programs at health systems due to increased consumer expectations and competition from new entrants such as Amazon, and also due to continuing labor shortages that can be mitigated only through increased adoption of technologies such as automation. The most advanced enterprises are deepening their consumer orientation and user experience design to meet competitive forces. Leading health systems have targeted consumer data platforms as a priority, aiming to unify patient data into a single, common identifier as a building block for digital capabilities. There is an enhanced focus on provider and caregiver experiences with the goal of reducing workload and burnout. Our leaders see significant potential for analytics, AI, and voice-recognition tools.

All the participants in our inaugural DigiM™ Digital Maturity Momentum Awards Program reported that they learned much about their own progress and their current state of digital transformation through the benchmarking with peer organizations and hope to use that to target their priorities for the coming year. In this report, we have shared some of the benchmark data to inform digital and technology leaders in their digital transformation journeys.

Congratulations to all the winners from the Damo DigiM™ Digital Maturity Momentum Awards Team !



Paddy Padmanabhan
CEO
Damo Consulting Inc.





2022 DigiM™ Digital Maturity Momentum Award Winners

Industry Leaders: Digital
Transformation Strategy &
Execution

Geisinger

 **Providence**

 **Northwell Health®**

Honor Roll: Digital
Transformation Strategy &
Execution

 **Virtua**
Health

 **Intermountain®**
Healthcare

 **SCL Health**
Now Intermountain Healthcare

 **UNIVERSITY of
ROCHESTER**
MEDICAL CENTER

 **SENTARA®**

MediSys *Health
Network*

Consumer
Digital
Leadership

Geisinger

 **Providence**

 **Intermountain®**
Healthcare

 **Northwell Health®**

Technology
Enablement &
Innovation Leadership




Geisinger







 **Providence**

 **SENTARA®**

 **Northwell Health®**

Award Categories and Awardees

Overall Leadership Award for Digital Transformation Strategy & Execution		
		
<p>Academic medical center</p> <p># of employees – 26,000</p> <p>Annual revenue - \$8.8 billion</p> <p>www.geisinger.edu</p>	<p>Not-for-profit health system</p> <p># of employees – 130,000</p> <p>Annual revenue - \$27 billion</p> <p>www.providence.org</p>	<p>Non-profit health system</p> <p># of employees – 80,000</p> <p>Annual revenue - \$15 billion</p> <p>www.northwell.edu</p>
Award Categories		
<ul style="list-style-type: none"> • Digital Transformation Strategy & Execution • Consumer Digital Leadership • Technology Enablement and Innovation Leadership 	<ul style="list-style-type: none"> • Digital Transformation Strategy & Execution • Consumer Digital Leadership • Technology Enablement and Innovation Leadership 	<ul style="list-style-type: none"> • Digital Transformation Strategy & Execution • Consumer Digital Leadership • Technology Enablement and Innovation Leadership
Digital Transformation Leadership		
<ul style="list-style-type: none"> • Karen Murphy, PhD, RN, Executive Vice President, Chief Innovation and Digital Transformation Officer • John Kravitz, MHA, Chief Information Officer • Rebecca Stametz, DEd, MPH, VP, Digital Transformation • Don Stanziano, Chief Marketing Officer • Sarah Sommer, MBA, VP, Digital Engagement • David Vawdrey, PhD, Chief Data Informatics Officer • Emily Fry, MBA, VP, Innovation Operations 	<ul style="list-style-type: none"> • Sara Vaezy - Chief Strategy & Digital Officer 	<ul style="list-style-type: none"> • Michael Oppenheim MD, SVP, Clinical Digital Solutions • Emily Kagan Trenchard, SVP, Consumer Digital Solutions • Sophy Lu, SVP, Digital IT & Services • Joseph Schulman, SVP, Enterprise Data and Information Intelligence • Rebecca Kaul, PhD, SVP, Digital Innovation & Transformation

Honor Roll Winners for Digital Transformation Strategy & Execution					
					
Not-for-profit health system # of employees – 14,000 Annual revenue - \$2 billion www.virtua.org	Non-profit health system # of employees – 42,000 Annual revenue - \$7.7 billion www.intermountainhealthcare.org	Non-profit health system # of employees – 16,000 Annual revenue - \$2.9 billion www.sclhealth.org	Not-for-profit health system # of employees – Over 30,000 Annual revenue - \$10 billion www.sentara.com	Not-for-profit health system # of employees – 20,000 Annual revenue - \$3 billion www.urmc.rochester.edu	Not-for-profit health system # of employees – 6,700 Annual revenue - \$1.96 billion www.medisyshealth.org
Award Categories					
• Digital Transformation Strategy & Execution	• Digital Transformation Strategy & Execution • Consumer Digital Leadership	• Digital Transformation Strategy & Execution	• Digital Transformation Strategy & Execution • Technology Enablement and Innovation Leadership	• Digital Transformation Strategy & Execution	• Digital Transformation Strategy & Execution
Digital transformation Leadership					
<ul style="list-style-type: none"> • Tarun Kapoor, M.D, Chief Digital Transformation Officer • Danielle Wilson, AVP of Digital Transformation 	<ul style="list-style-type: none"> • Craig Richardville, Chief Digital and Information Officer • Dan Liljenquist, Chief Strategy Officer • Mona Basset, Vice President, Digital Services • Lydia Jumonville, Interim President and Chief Executive Officer 	<ul style="list-style-type: none"> • Craig Richardville, Chief Digital and Information Officer • Mona Basset, Vice President, Digital Services • Lydia Jumonville, Interim President and Chief Executive Officer 	<ul style="list-style-type: none"> • Tim Skeen, SVP & Enterprise Chief Information Officer • Jamisson Fowler, Vice President, Digital Transformation 	<ul style="list-style-type: none"> • Michael Hasselberg, Chief Digital Officer • Dave Mitton MD, Director of the Innovation Lab • David Waldman MD, Chief Medical IT Development officer • Greg Nicandri MD, CMIO • Rosemary Ventura RN, CNIO • Jim Forrester, CTO, CIO • Lisa Nelson, CIO 	<ul style="list-style-type: none"> • Sami Boshut, CIO • Bruce Flanz, CEO • Sabiha Raoof, MD, CMO • Mounir Doss, CFO

Digital Maturity Benchmark Data

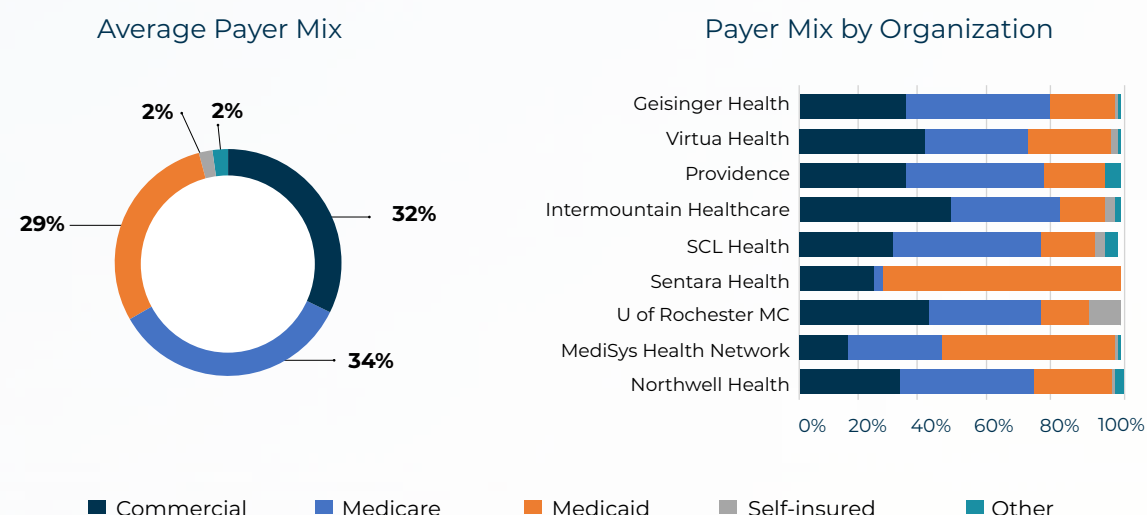


FIGURE 1: BREAKDOWN BY PAYER MIX

Source: Damo DigiM™ Digital Maturity Model Benchmarks

The payer mix of the leading organizations indicates a roughly equal mix of Commercial, Medicare, and Medicaid populations. The payer mix influences investment priorities and choices for digital programs. Digital leaders are taking into consideration the needs of every population segment while developing technology-enabled solutions.



"We are honored to be named an overall leader in the Damo Digital maturity awards program. The award is a recognition for the significant achievements and positive outcomes that we have made in digitally enabling our consumer, clinical and employee experiences. Digital maturity is not the job of only one team in an organization. It's a cultural shift made possible by the work of many hands - not all of them tech folks - across the care continuum. And as is true within our health systems, so is this way of digital transformation for the American healthcare landscape: growth made possible by an ecosystem of providers and partner organizations across the country who motivate and inspire one another's evolution."

Emily Kagan Trenchard

Senior Vice President, Chief Consumer Digital Solutions
Northwell Health

"Geisinger's dedicated digital Strategy along with our continued investment in developing our digital infrastructure and implementing digital-first consumer experiences, help further our ongoing commitment to making better health easy."

Karen Murphy, PhD, RN

EVP and Chief Innovation Officer
Geisinger



"Digital is the mechanism by which we can deliver high-value care at scale—supporting our promise to 'know me, care for me, ease my way.' We do this by enabling self-service, by co-developing new digitally enabled business and care/operating models—and we do this in a way that better serves our communities and caregivers."

Sara Vaezy

Chief Strategy and Digital Officer
Providence

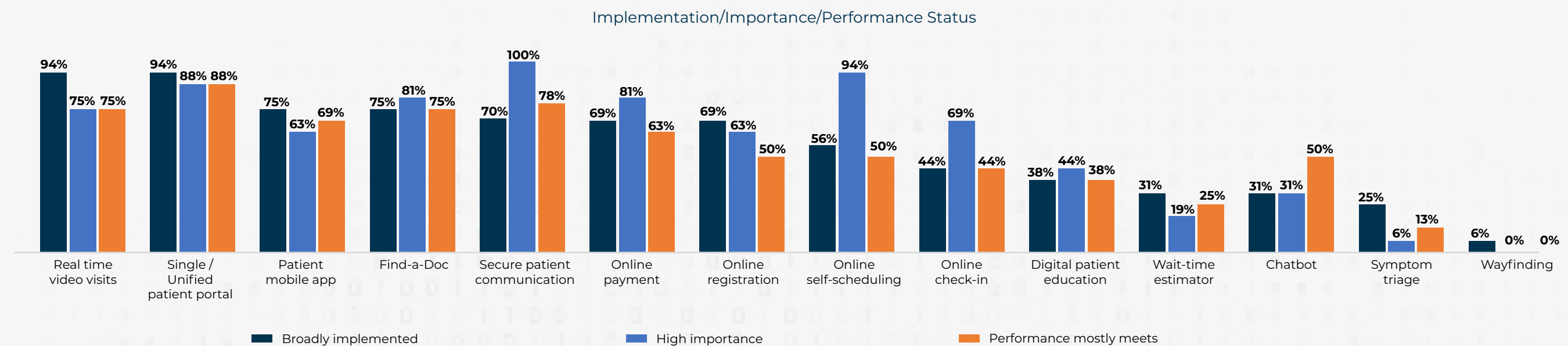


FIGURE 2: PATIENT ENGAGEMENT – DIGITAL ADOPTION
Source: Damo DigiM™ Digital Maturity Model Benchmarks

Our benchmark data indicates that while many high-value digital engagement tools such as telehealth and find-a-doc solutions are broadly deployed and performing well, several important functionalities, such as online self-scheduling are not meeting performance expectations. The gap between importance to the organization and the extent to which a particular solution has been deployed indicates the opportunity areas for improvement for health systems in general.

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We leverage automated SMS or automated phone calls for appointment reminders and discharge follow up. Also, we offer unauthenticated scheduling where consumers can schedule appointments online without having a MyChart account or authentication.

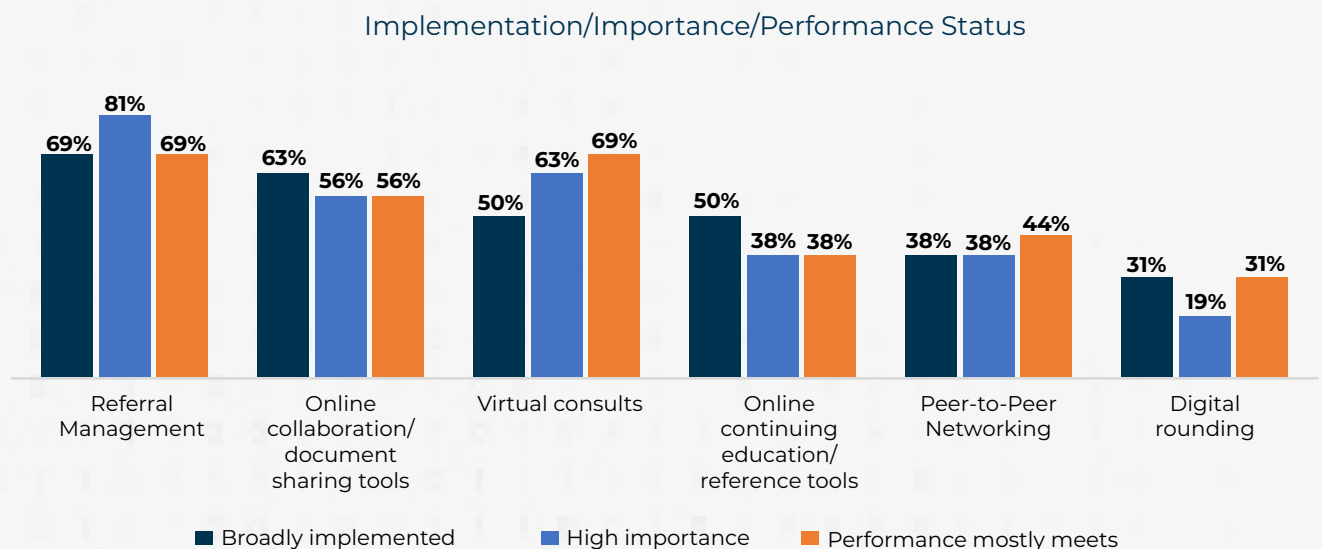


FIGURE 3: PROVIDER ENABLEMENT – DIGITAL ADOPTION

Source: Damo DigiM™ Digital Maturity Model Benchmarks

Many health systems are in early stages of addressing the digital enablement needs of providers and caregivers, indicated by the moderate levels of importance for common use cases. In an environment of labor shortages and rising workloads, provider enablement is fast becoming a high-priority area. One of the leaders in our maturity awards has appointed an executive to a full-time role to address provider needs.

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With voice-enabled tools, we have seen increased provider satisfaction, decreased pajama time, increased clinical documentation quality and productivity, by leveraging speech analytics to improve call center agent productivity, and improved note closure turnaround time.



“We are grateful for the DigiM™ Honor Roll recognition. Firstly, it’s a moment to celebrate the accomplishments across our organization over the past 18 months. Additionally, it’s an opportunity to benchmark ourselves amongst the best of the best, and that allows us to focus on how to become even better.”

Tarun Kapoor, M.D.
Chief Digital Transformation Officer
Virtua Health

“We are pleased to be recognized in the Damo digital maturity awards program. Digital transformation is a complex, multi-year effort that requires leadership commitment and a coordinated effort among several stakeholder groups. At Sentara, we have built a strong technology foundation for the transformation and are on our way to build best-in-class experiences for our members and patients. We have benefited from the peer group evaluation provided by the maturity assessment, and the benchmarks will enable us to set our digital priorities for the coming year.”

Tim Skeen
SVP & Enterprise Chief Information Officer
Sentara Health



“When we focus on the people, good things happen. The people – our consumers, patients and members – are the foundation of our digital strategy, which is designed to help guide them to engage easily and confidently through their health journeys, anywhere and anytime. Excellent digitally enabled experiences will continue to be expected and pivotal in providing greater access to healthcare for our communities into the future, and we expect to help lead the way in delivering those experience.”

Craig Richardville
Chief Digital and Information Officer
Intermountain Healthcare

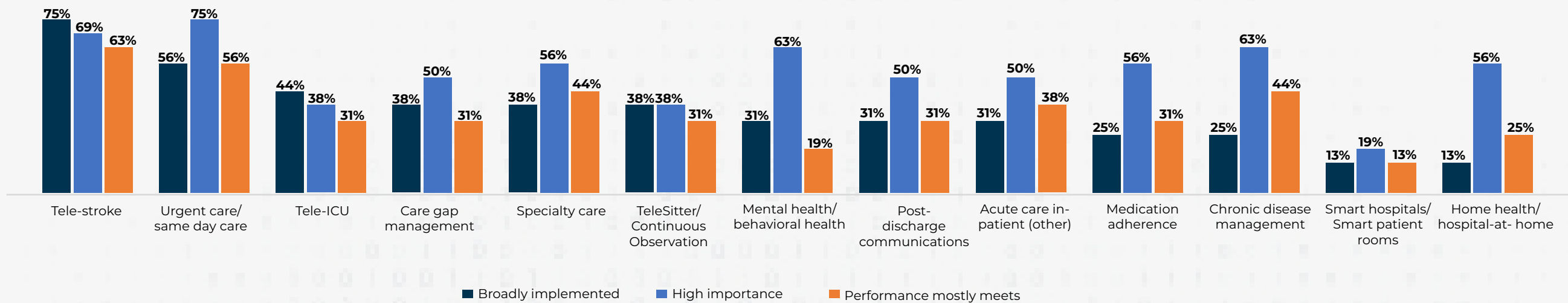


FIGURE 4: CARE MANAGEMENT – DIGITAL ADOPTION

Source: Damo DigiM™ Digital Maturity Model Benchmarks

There are multiple opportunities in care management indicated by the consistent gap between the level of importance and the extent a solution has been deployed. Notably, at a time when mental health is a widespread crisis, providing digital behavioral health services has been one of the biggest challenges for health systems. Medication adherence and chronic disease management are also among high-value use cases for digital enablement in care management.

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We have achieved approximately 40% relative reduction in 30-day readmission for hospital discharge patients obtaining RPM, and approximately 50% relative reduction in ED 14-day revisit for COVID patients enrolling in RPM.

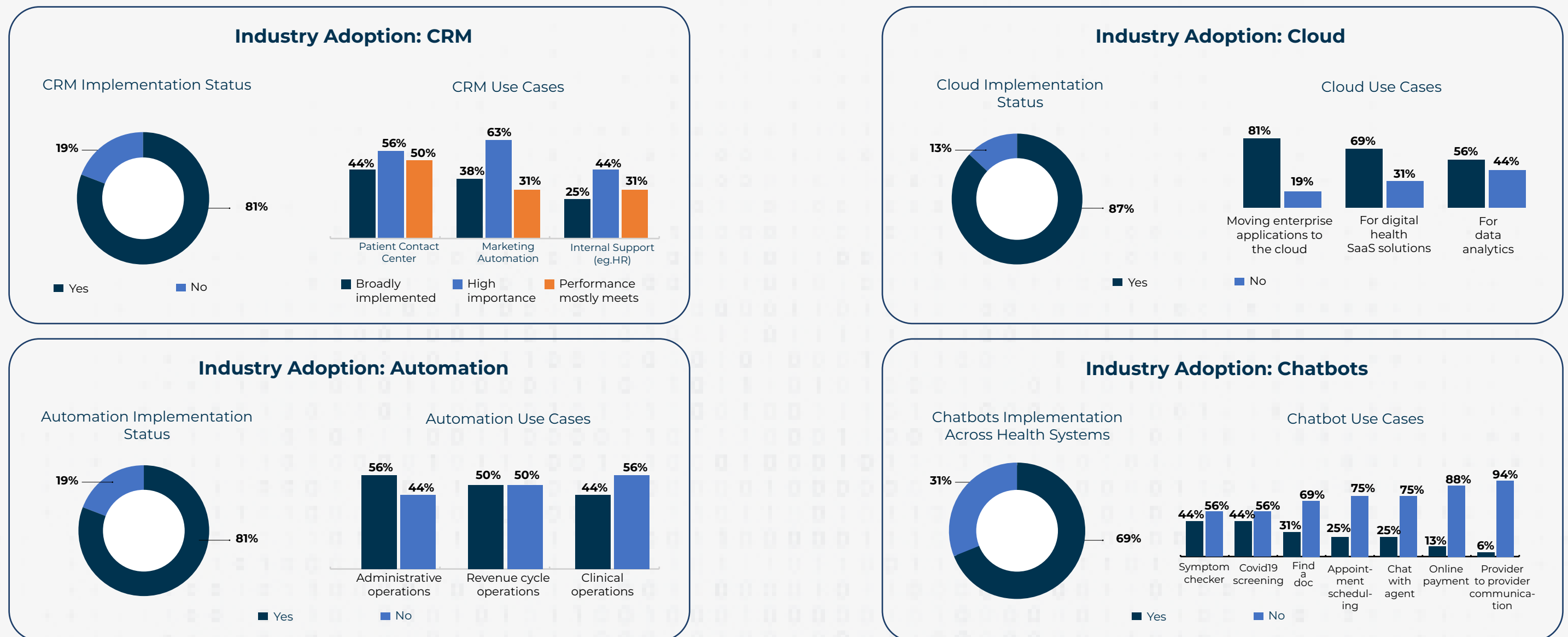


FIGURE 5: ENTERPRISE TECHNOLOGY PLATFORMS AND TOOLS THAT ARE BEING DEPLOYED IN DIGITAL TRANSFORMATION PROGRAMS

Source: Damo DigiM™ Digital Maturity Model Benchmarks

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We have over 65 automation projects live in production with over 100 bots managing those efforts. We have seen over \$5 million in annual realized benefits that grows each year as our efforts expand. This work expands across all areas of the enterprise including our clinical and health plan, as well as back office administrative tasks.

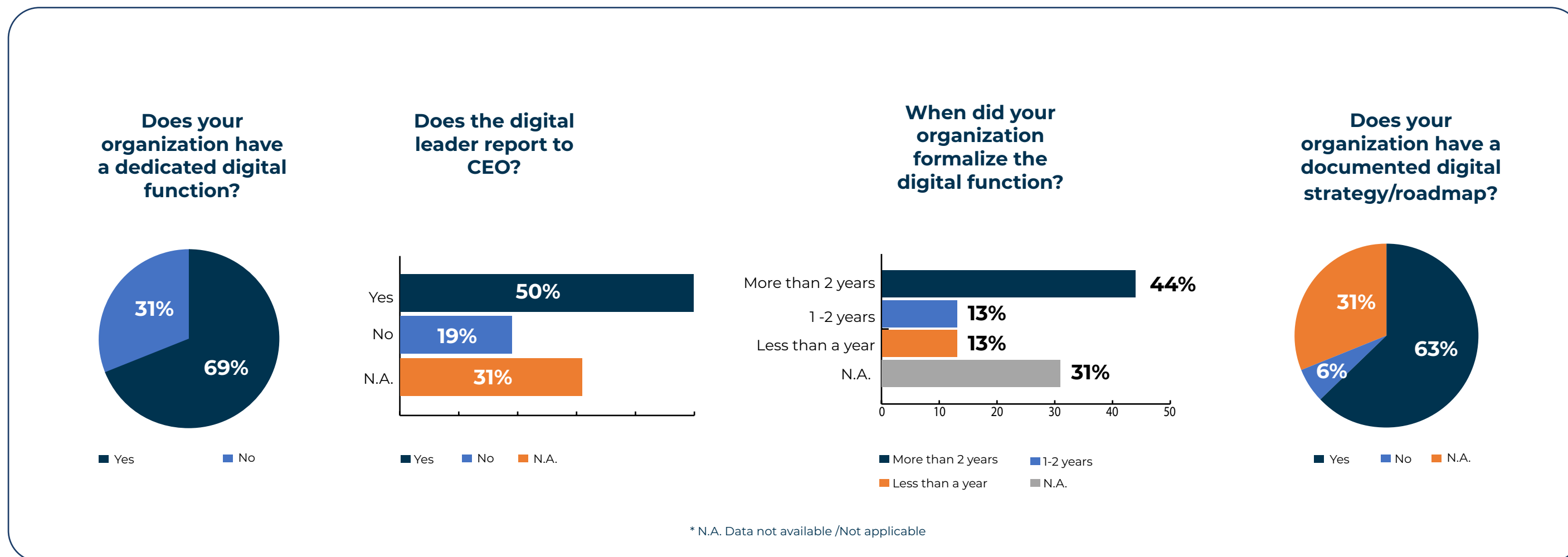


FIGURE 6: INDUSTRY BENCHMARKS: ORG MODEL AND GOVERNANCE

Source: Damo DigiM™ Digital Maturity Model Benchmarks

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Our digital transformation budget is extremely comprehensive, focusing on technologies that enable consumer, patient and caregiver/employee engagement. This includes things like: patient portal, consumer mobile apps, intranet site, virtual care management, website, service management, CRM, provider communication tools, and more.

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Our Digital Transformation Office (DTO) functions as a steward of the technology vision and supports the digital health roadmap collaborating with operational leaders and IT. The DTO supports virtual care and digital front door strategies to ensure we become and remain a leader in providing a comprehensive patient experience through multi-channel patient access and engagement.

The DigiM™ Digital Maturity Framework and Awards Methodology

The DigiM™ Digital Maturity Awards Program recognizes the leaders among healthcare provider organizations who have demonstrated significant progress with their digital transformation programs. The awards are based on submissions provided by individual health care organizations. The online submissions were based on a standardized maturity assessment framework and a proprietary scoring tool that evaluated the individual submissions across four major dimensions. There were sixteen submissions that were considered for the awards. The final awardees were selected based on overall scores as well as excellence in a few specific individual dimensions. An independent panel of advisors/judges provided advice and guidance on the overall process and final outcomes.

Advisory Panel

We thank our panel of independent advisors for their guidance and support.



John Glaser
Executive in Residence
Harvard Medical School



Josh Goode
Chief Information Officer
SCAN Health



Nick Patel
Chief Digital Officer
Prisma Health

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We invite you to
visit www.damoconsulting.net

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To know more about our DigiM™ Digital Maturity Assessment or take the
assessment, drop us a [message](#).



Damo Consulting provides digital transformation advisory services to enable healthcare organizations navigate the technology-enabled transition to telehealth and virtual care. We bring deep industry knowledge, market insights and technology skills to help develop and implement enterprise digital roadmaps.

