



THE HEALTH CLOUD

KEY INFRASTRUCTURE FOR DIGITAL TRANSFORMATION

The importance of cloud computing for the next
phase of digitally-enabled healthcare



EXECUTIVE OVERVIEW

The COVID-19 pandemic demonstrated the need for healthcare enterprises to accelerate their digital transformation. Only cloud computing provides the agility, scalability, and innovation capabilities to allow an organization to successfully transition to a digital future. Forward-thinking healthcare leaders see cloud computing as not just an engine for efficiency gains but as the primary way to capitalize on opportunities in digital healthcare.

Cloud computing improves every aspect of a healthcare enterprise's use of information technology (IT). Organizations pay only for the resources they use, enabling them to closely align costs with actual utilization of compute and storage resources. They can easily add IT capacity and treat it as an operating expense – as opposed to undergoing an administratively arduous capital acquisition. As clinical or business requirements change, they can scale their consumption of IT resources up or down with relative ease. Healthcare enterprises of all types are rapidly adopting cloud computing to achieve these benefits.

To be successful at digital transformation, healthcare enterprises need more than what is available from the large public cloud vendors. They should partner with a cloud vendor that has healthcare and healthcare IT (HIT) experience and expertise. Such a Health Cloud vendor not only shoulders the IT burden, but it also frees healthcare enterprises to focus their innovation resources and energies on their core healthcare mission.

Health Cloud puts an ecosystem of third-party tools, services, and applications at the disposal of healthcare enterprises. Health Cloud vendors have established partnerships with many companies in the IT, HIT, and healthcare sectors that bring significant healthcare application and workflow expertise. They also offer strong developer support capabilities. The ability to extend applications and data capabilities means that organizations can build on past IT investments and experience faster time-to-value.

A Health Cloud vendor must have significant healthcare data experience to deliver the any-to-any data connectivity needed to address the challenges of highly siloed, widely distributed healthcare data. It provides an alternative to traditional IT implementations in which the healthcare enterprise spends time, attention, and resources on non-core or non-differentiating data management and governance activities.

This white paper provides ideas for healthcare enterprises seeking to understand what a Health Cloud vendor can do to help them with their digital transformation efforts. It can be used to define reasonable expectations for selecting and working with cloud vendors.



THE HEALTH CLOUD IS KEY TO DIGITAL TRANSFORMATION

The use of digital tools in healthcare grew rapidly during the COVID-19 pandemic. Most healthcare enterprises are now thinking more strategically about their digital transformation. Only cloud computing provides the agility, scalability, and innovation capabilities to successfully transition an organization to a digital future.

Cloud computing has grown explosively in the last ten years as enterprises seek its benefits: faster time-to-market, simplified innovation, easier scalability, and reduced risk. More recently, healthcare enterprises have begun to rapidly adopt cloud computing for the same reasons. Forward-thinking healthcare leaders see cloud computing as not just an engine for revenue growth and efficiency gains but as the primary way to capitalize on opportunities in digital healthcare.

Despite this growing interest, many healthcare leaders have questions about what cloud computing is, when to

use it, and what advantages it has compared to conventional IT. This white paper will frame the issues involved in deciding when and how to adopt cloud computing to dispel some of the confusion that exists. It can help healthcare enterprises understand what a cloud vendor can or cannot do for organizations having different skills and people resources available to work on digital transformation efforts. It will also help set some reasonable expectations for selecting and working with a cloud vendor.

Forward-thinking healthcare leaders see cloud computing as not just an engine for revenue growth and efficiency gains but as the primary way to capitalize on opportunities in digital healthcare.

WHAT IS CLOUD COMPUTING?

Cloud computing is usually defined as the on-demand delivery of IT resources over the Internet with pay-as-you-go pricing. Instead of acquiring and maintaining computers, storage, and networking, customers access as much of each resource as they need from a cloud provider. Three deployment models of cloud computing describe how most enterprises use cloud computing services. The differences between them boil down to whether the cloud vendor or its customer controls or manages the resources.

Most are familiar with the pre-cloud on-premises model, in which an organization buys its own hardware and software to run its application. It houses these resources in a data center or other environment which it owns or controls. Remote hosting resembles the on-premises model in

that the computers, storage, and networking reside in the vendor's facility but are managed, programmed, and used exclusively by the customer.

Infrastructure-as-a-Service (IaaS) is a cloud computing model in which the cloud vendor owns and operates networking features, computers, and data storage. It provides its customers with secure access to these resources. A customer can build anything with the cloud vendor's parts but must assemble and run it. IaaS gives organizations maximum flexibility and management control over its IT resources. It resembles the familiar on-premises model in that it imposes significant responsibility on the customer organization to manage and control IT resources and develop new features and functionality.

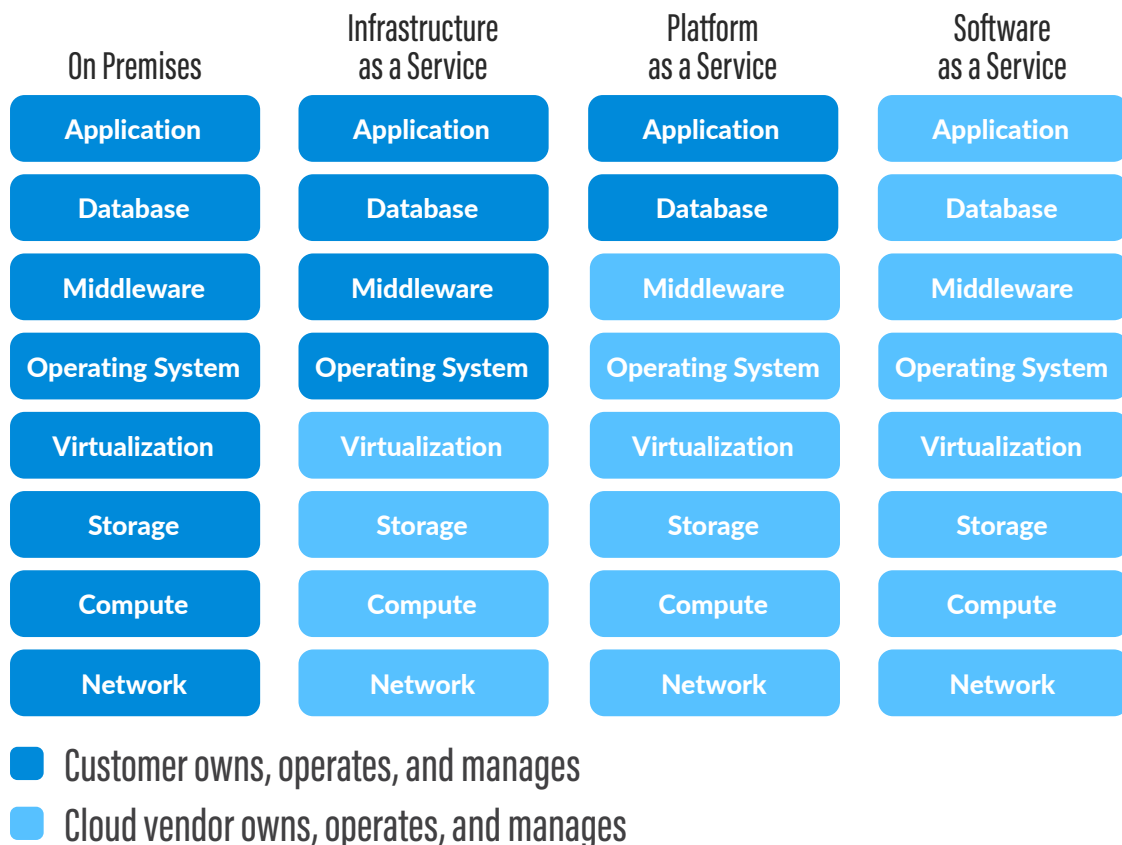


Figure 1.
Cloud Computing
Models

By contrast, Software-as-a-Service (SaaS) provides an organization with a complete turnkey product or solution that is run and managed by the cloud provider. With a SaaS offering, customers have no responsibility for maintaining the service or managing the underlying infrastructure. They mostly leave the development of new features to the SaaS vendor. SaaS-based offerings have been widely adopted for generic business functions such as marketing and sales, corporate email, human resources, or financial and cost accounting. In healthcare, there are few mature or comprehensive SaaS solutions for core functions such as patient care, medical billing and payment, clinical research, or drug commercialization. For this reason, healthcare enterprises need to be able to build or source their own high value healthcare specific applications and services. Healthcare enterprises seeking the advantages of cloud computing will be better served by the Platform-as-a-Service (PaaS) model.

The PaaS model allows a healthcare enterprise to focus its workforce and resources on building better applications to support its core healthcare-related functions. It frees organizations from concerns about hardware and network procurement, facilities planning, power management, capacity planning, backup and recovery, software maintenance, security patching, or any of the other important but non-healthcare related activities necessary to running applications. The cloud vendor assumes responsibility for some or all such tasks for the healthcare enterprise. With PaaS, healthcare leaders can make efficient use of resources and meet the challenge of heightened expectations of the healthcare industry.

Why Health Cloud?

Health Cloud is an indispensable element in healthcare digital transformation for several reasons. Healthcare enterprises can leverage it to deliver impactful digital patient or member experiences in days rather than months. It can also support analytics that would be impractical or cost-prohibitive with traditional technology platforms and conventional tools. It removes the need for healthcare enterprises to manage underlying infrastructure and allows them to focus time, resources, and creativity on deriving more clinical, administrative, and business value from their applications and data. Organizations can optimize their plans and processes to pursue multiple clinical and business goals in the dynamic healthcare sector. It not only ensures continued

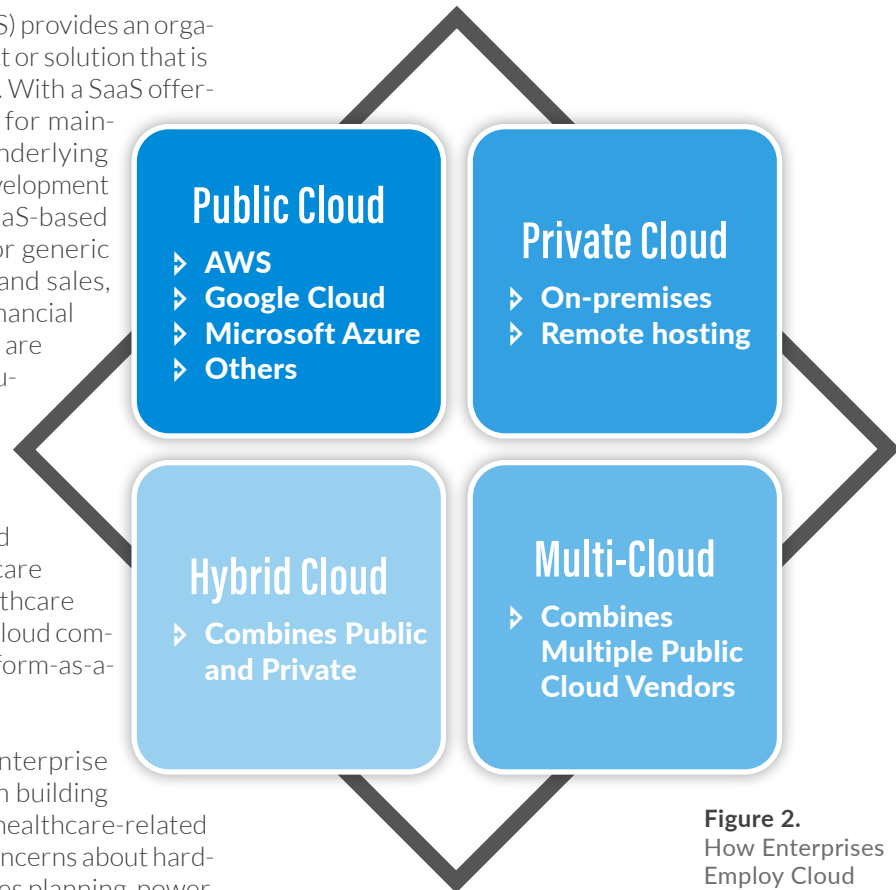


Figure 2.
How Enterprises
Employ Cloud
Computing

success at fee-for-service (FFS) care delivery models, but it also provides a foundation for building and deploying value-based payment models and hybrid care delivery programs and organizations across a wider healthcare community. Importantly, a Health Cloud is responsive to the needs of every healthcare market segment – providers, payers, life sciences, digital health, pharmaceutical companies, and device manufacturers.

Data is the beating heart of healthcare digital transformation. A Health Cloud can supply the cardiopulmonary system that enables digital transformation of your healthcare business based on a deep understanding of health data and the needs of health enterprises.

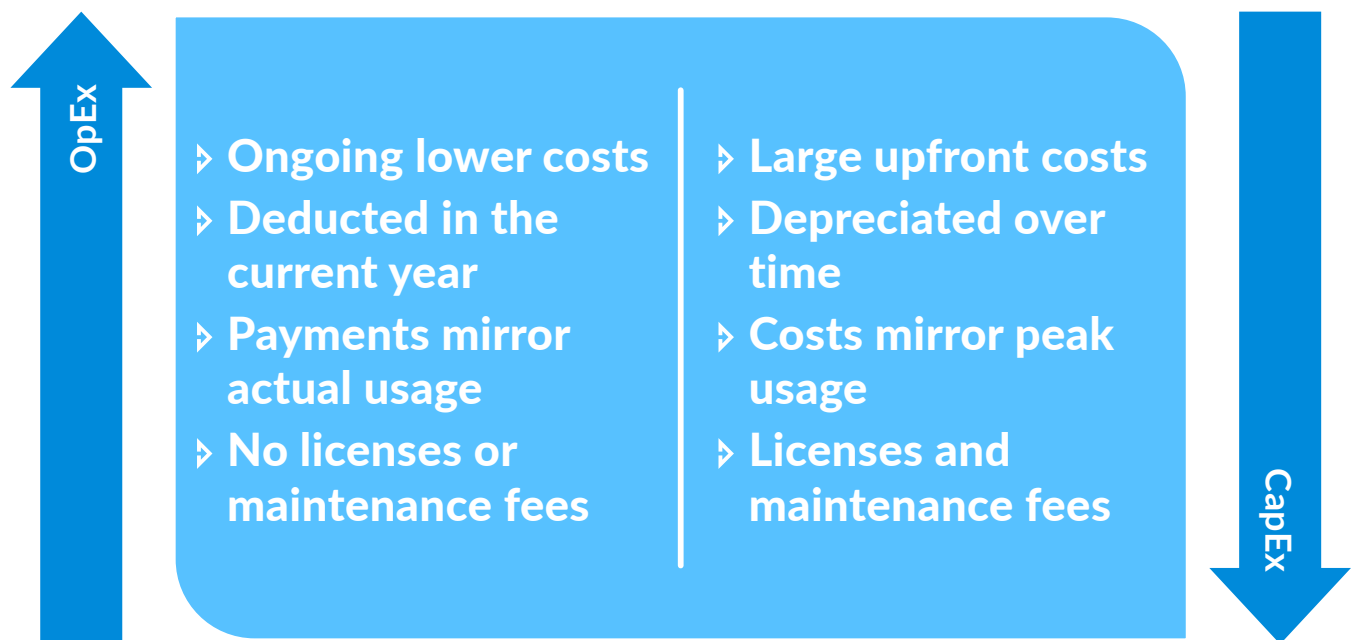


Figure 3.
OpEx and CapEx
Compared

Predictable Costs and Flexible Resources

Health Cloud delivers powerful resources that the healthcare enterprise controls. Organizations traditionally acquired space, equipment, software, and a workforce to run and maintain their on-premises IT services. They made large up-front investments that delivered benefits over a long period. Such capital expenditures (CapEx) had the advantage of predictability but had some disadvantages as well. Healthcare enterprises were compelled to acquire more resources than they needed to give them room for growth. When the time came to add capacity, the purchasing process was often complex and time-consuming. Companies were also locked into specific technologies for the long-term, limiting their ability to respond to an ever-changing healthcare industry. Competition for capital dollars in healthcare enterprises meant that new IT expenditures had to undergo rigorous justification and vetting processes.

Moving to pay-as-you-go cloud computing allows a healthcare enterprise to treat its costs as operating expenses (OpEx) in the current year. OpEx offers healthcare enterprises many benefits because of its straightforward, pay-for-what-you-use pricing model. Sourcing capacity and IT

services from a cloud vendor is far less onerous. Procuring and contracting subscription-based services is far simpler. Organizations can eliminate the need to own and operate a data center. Capacity can be rightsized with no need to overbuy based on anticipated future needs. New capacity can be acquired and used as needed. Maintenance and repair costs are avoided completely. Cloud computing helps organizations closely align their ongoing costs with the value they receive from IT. The IT organization need not compete with other parts of the organization for capital expenditures. Importantly Health Cloud helps ensure that an organization can access and use the most modern and stable technologies. The healthcare enterprise can focus on its core healthcare competencies and constituencies, rather than on managing its IT infrastructure.

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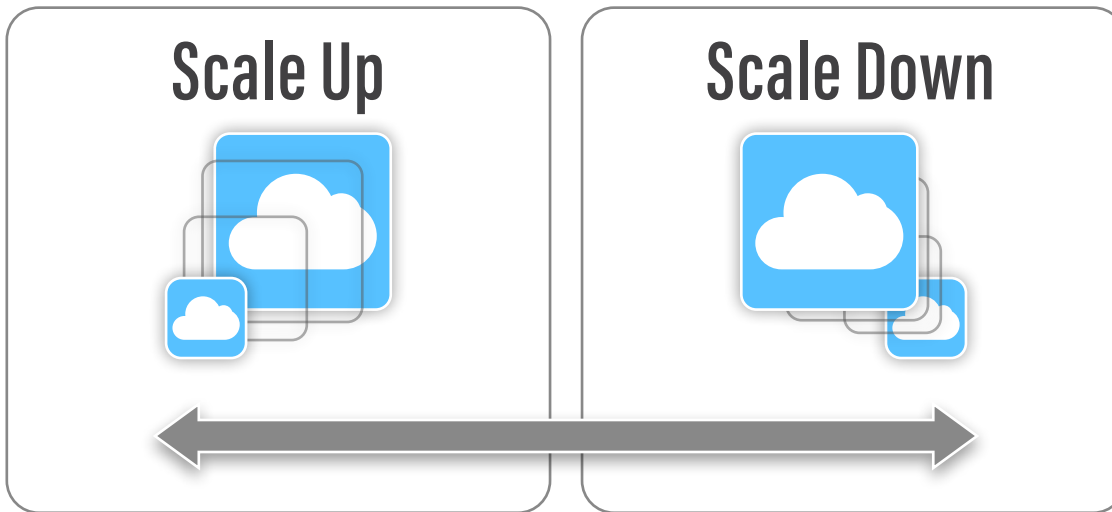


Figure 4.
Scale to Meet
Demand

- ▶ Accelerate digital transformation strategy
- ▶ Pay only for resources used
- ▶ Match capacity to real business demands

Scale Up or Down with Relative Ease

With Health Cloud, there are no upper limits imposed on the organization and its use of IT. The organization can respond quickly as new users, applications, or processing demands arise. Successful applications can be deployed to new parts of an organization rapidly and efficiently. At the same time, the organization pays only for what it uses. For example, if transaction loads decrease on a seasonal basis, the organization can easily scale back its usage. Healthcare enterprises need not acquire and pay for resources to be always ready for peak loads.

Some elements of cloud infrastructure can also be used and paid for on a by-the-minute basis. Serverless computing refers to a cloud capability that supports infrequent and/or short duration needs. Unlike storage resources which are used continuously to store patient or member data, serverless gives the healthcare enterprise the ability to consume resources for a very short time. For example, HL7-based interfaces might only be needed in short bursts every few weeks. The ability to pay for these interfaces only during those times gives healthcare enterprises more control over their IT spending.

Digital Innovation Comes from Extensibility

Cloud computing is designed from the ground up to encourage innovation and evolution. Customers want choice over the applications they build or buy. A Health Cloud puts an

ecosystem of third-party tools, services, and applications at the disposal of healthcare enterprises. Cloud vendors have established partnerships with many companies in both the IT and healthcare sectors. These companies can bring significant healthcare application and workflow expertise, fostering innovation and experimentation by healthcare enterprises.

Health Cloud also has an underlying philosophy that implementers, developers, and operators should receive significant support and resources to maximize their effectiveness. Cloud vendors have an API-first philosophy to integration and development, ensuring that healthcare enterprises have significant innovation capabilities. Solid DevOps support is a necessary precondition to any successful healthcare digital transformation strategy.

Taken together, an ecosystem of proven third-party solutions with expansive developer support, amplifies a healthcare enterprise's ability to usher in creative approaches to digital transformation.

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Supports Diverse Data Management Options and Technologies

Data is at the heart of any healthcare digital transformation strategy. Strong data management capabilities protect investments made in electronic health records (EHRs) and other applications. Most healthcare enterprises can benefit from the wealth of different database technologies available in the market. While relational databases have been a mainstay for decades and continue to dominate most application portfolios, alternatives offer attractive performance and cost advantages. Non-relational databases offer significant processing efficiencies as well as the ability to develop and deploy applications more rapidly. A Health Cloud makes it relatively easy for an organization to match its application and process needs to a database technology that delivers both rapid development and high-performance applications.

A cloud vendor must also be able to support the major approaches to staging data for use in digital health applications. Data warehouses, data marts, and data lakes have long fueled analytics and reporting applications. Increasingly, these approaches are seen as an effective way to stage data for a broad array of applications. Data warehouses and marts typically contain data that has been transformed and made uniform for diverse application needs. Data lakes contain data the way it was created in the original application. Such “raw” data can be transformed and prepared on demand for a variety of downstream uses and use cases. Either way, healthcare enterprises need the flexibility to rapidly leverage different approaches for different application needs.

Healthcare enterprises also routinely receive data in a cacophonous array of formats. They need to ingest and process data regardless of how it is expressed or delivered

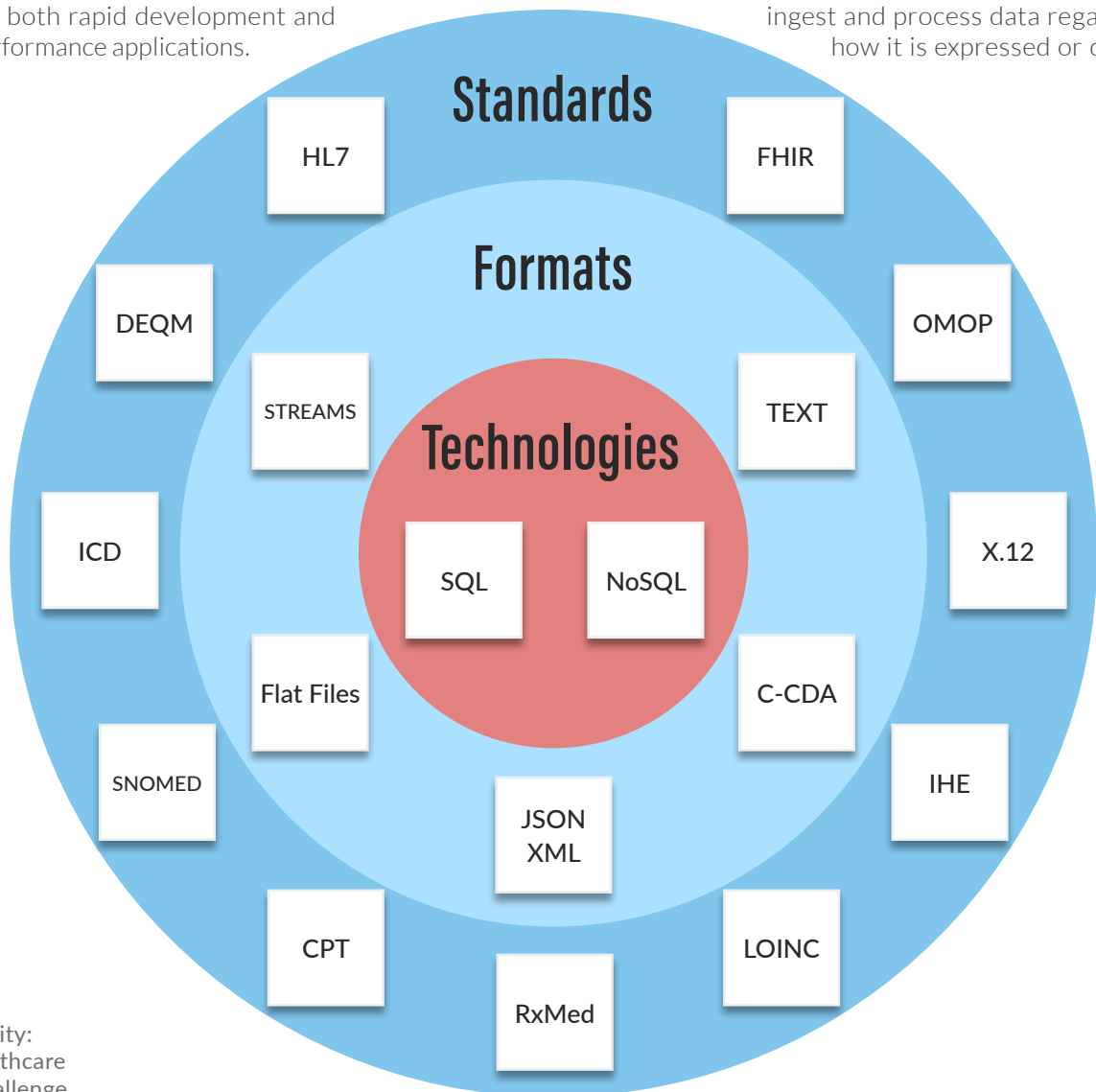


Figure 5.
Complexity:
The Healthcare
Data Challenge

to the organization. A Health Cloud must be able to deal with scores of different healthcare standards and expressions to produce standardized and uniform data suitable for downstream use cases and processing needs.

Partial to Fully Managed Service

A Health Cloud also permits a flexible division of responsibilities between vendor and healthcare customer. The customer can let the vendor manage the complete environment – a fully managed service. Alternatively, the healthcare enterprise may opt to manage aspects of its IT infrastructure that are sensitive to its healthcare mission or for which it has expertise. For example, the healthcare enterprise could opt to manage the ingestion and preparation of data for its applications. It could perform some of its own database administration or data science because of its detailed understanding of its own data resources. The ability to structure a fully or partially managed services arrangements means that the healthcare enterprise can be sure that it is optimizing its skills and workforce for its digital transformation.

Supports Hybrid and Multi-cloud Approaches

Many healthcare enterprises want to be able to blend their existing on-premises applications with new cloud-based applications. They may also want to run applications on more than one public cloud. A Health Cloud vendor should be able to meet both requirements. Hybrid and multi-cloud support can be an important consideration for healthcare enterprises seeking maximum flexibility or negotiating leverage with cloud and technology vendors.

\$14.7B+

In investment in digital health technology in first half of 2021





ESSENTIAL CLOUD CAPABILITIES FOR HEALTHCARE DIGITAL TRANSFORMATION

Digital transformation is defined as the integration of digital technologies into all areas of a business, fundamentally changing how it operates and delivers value to its customers. Since healthcare enterprises are increasingly subject to a range of challenges to their status quo, digital transformation will also involve culture change. To survive and thrive, they will need to experiment rapidly enough to have room for failure. Most have recognized that it is no longer sufficient to optimize business or clinical capabilities. Instead, healthcare enterprises see digital transformation as the key to their long-term survival.

For example, while COVID-19 disrupted all parts of the healthcare industry, one specific impact was the rapid adoption of virtual care delivery. While the initial spike did not last, virtual care utilization will continue at much higher than pre-COVID-19 levels for the foreseeable future. The eventual payment model will probably be complex, with ripple effects across the industry. Importantly, virtual care will not be an opportunity only for traditional care delivery organizations. Ideas about what virtual care is, its component elements, how patient and caregiver experience of virtual care can be improved, and how to make it successful and effective with different payment models will evolve and change. Many different healthcare and non-healthcare players are right now planning to capitalize on this opportunity. Healthcare enterprises require a computing infrastructure that allows them to marshal digital resources and cloud services to anticipate and meet such unknown and hard-to-predict demands head-on.

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Deliver Any-to-Any Health Data Connectivity

The ability to receive, process, and use data from any application or organization in the wider healthcare community – any-to-any connectivity – is a critically important requirement for a Health Cloud. Clinicians and administrators will make better decisions if they have access to information from other organizations and parts of the healthcare system. No healthcare enterprise has all relevant data about a patient within its own applications. They must rely on organizations across their connected community to assemble a complete complement of high-quality patient data. HCOs also need to be well positioned technically to take advantage of new and evolving data classes over time. A Health Cloud must support data in any relevant healthcare standard that arrives from, or is exchanged with, any organization in the wider healthcare community.

Data that is potentially relevant in healthcare can also come from new or previously unknown sources. Genomic data science will soon enable researchers to use powerful computational and statistical methods to decode the functional

information hidden in DNA sequences. Genomics research is expected to generate between 2 and 40 exabytes of data over the next decade. This data, and data derived from it, will have many potential uses in healthcare. A Health Cloud will need to accommodate such data and begin to use it in applications.

Patient Originated Data

The volume of data and variety of data types created by, or originating from, consumers is also increasingly rapidly. The proliferation of consumer-oriented apps that leverage data from newly available provider and payer APIs will lead to consumer's contributing new data to the healthcare ecosystem. As patients use digital tools to interact with the healthcare system and increase their utilization of virtual care delivery options, the data they create will begin to make an impact across different kinds of healthcare applications and enterprises. A Health Cloud vendor must be able to incorporate and add value to a wealth of new data and data types created by consumers.

Expanding Organizational Sources of Data

Data sources from the consumer world and from organizations not traditionally associated with healthcare increasingly contribute data that can improve performance or support efficiencies for healthcare enterprises. Many parts of the wider healthcare community have not traditionally been major users of IT but have accumulated lots of patient data. Post-acute organizations have limited IT capabilities but have many opportunities to observe and interact directly with patients. The very large number and variety of potential sources and uses of such data in digital transformation efforts will impose requirements that any Health Cloud vendor will need to address.

Ensure Privacy and Security

Privacy and security are more important than ever. Consumers' already high level of concern that their healthcare data remain private is increasing. In the U.S., HIPAA requires many healthcare enterprises to guarantee that personally identifiable data remains private and secure. There is growing consensus that HIPAA's protections are insufficient and need to be enhanced. At the same time, ransomware incidents in healthcare are occurring more often than in the past and the perpetrators are demanding higher amounts. Such incidents can do lasting financial and reputational harm to a healthcare enterprise.

A Health Cloud vendor must, at a minimum, be HIPAA compliant, as well as HITRUST and SOC2 certified. It also must demonstrate its ability to extend such compliance to every aspect of its work with the healthcare enterprise. In the final analysis, a Healthcare Data Cloud vendor needs to show that it can help any healthcare enterprise maintain a high level of trust with its varied constituencies.

Healthcare Expertise

A Health Cloud vendor needs to bring significant experience working with different kinds of healthcare enterprises and their workforces to be a strong partner in the market. The large cloud vendors that sell across industries typically lack in-depth healthcare expertise. Over the years, many large horizontal technology players have attempted to build comprehensive healthcare technology capabilities with limited success. For this reason, it is important for healthcare enterprises to work with a cloud vendor that understands the financial, technical, data, and process challenges of building and running applications in and for healthcare.

Enterprises that deliver, pay for, or support care delivery for patients come in many flavors. This diverse array of organizations has complex clinical, financial, development, and operational processes. Uniformity and standardization are rarely to be found. Many of these organizations may not work together and can have diverging financial interests. A Health Cloud vendor needs experience working with this diverse set of interests to resolve complex governance issues.

Process change in healthcare enterprises is a complex undertaking. Understanding how changes affect other parts of the enterprise as well as external partners is a necessary precondition to the success of any digital transformation effort. Experience supporting process change for healthcare users across multiple organizations simultaneously is an important qualification for any cloud vendor.

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18%

The compound annual growth rate of the cloud computing market

Technology Expertise

A cloud-native healthcare data activation platform can deliver innovation capabilities that will empower any healthcare enterprise, its partners, and collaborators. It will deliver transparency in how data is processed to build interoperable applications that drive patient engagement and optimal outcomes across a healthcare community. Data collected in healthcare enterprises comes in a dizzying variety of standards, expressions, and formats. A vendor needs a deep understanding of healthcare data management complexities and challenges.

Most existing applications in healthcare were created using traditional IT tools and approaches. These mostly monolithic applications have been deployed to run under fixed capacity constraints in one or a few data centers. Simply moving such applications to the cloud will not deliver the numerous benefits of the cloud. The typical IT workforce in most healthcare enterprises is well versed in developing and operating applications using those traditional tools and approaches. Most will need to develop cloud-specific skills and knowledge to fully benefit from cloud computing. A Health Cloud vendor can help ensure that a healthcare enterprise's workforce is ready to fully leverage the benefits and advantages of cloud computing.

The Health Cloud vendor must supply not only the most modern, cost-effective hardware and software but also the services required to operate the infrastructure at scale. It must also be able to quickly leverage emerging technologies such as quantum computing, augmented or virtual reality, blockchain, advanced analytics, artificial intelligence, and machine learning.

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CALL TO ACTION

Any enterprise in any healthcare industry segment seeking digital transformation of its business and operations will need to fully explore the benefits of cloud computing. When evaluating the numerous general-purpose and healthcare specific cloud vendors we recommend that any healthcare enterprise seek answers to a series of related questions from prospective cloud vendors and their existing

IT vendors. In addition, they should carefully evaluate their own resources and readiness for embarking on a digital transformation journey. Answers to these questions and an exploration of the issues raised by them will help a healthcare enterprise crystallize its goals and expectations as well as differentiate between the many options available to them.

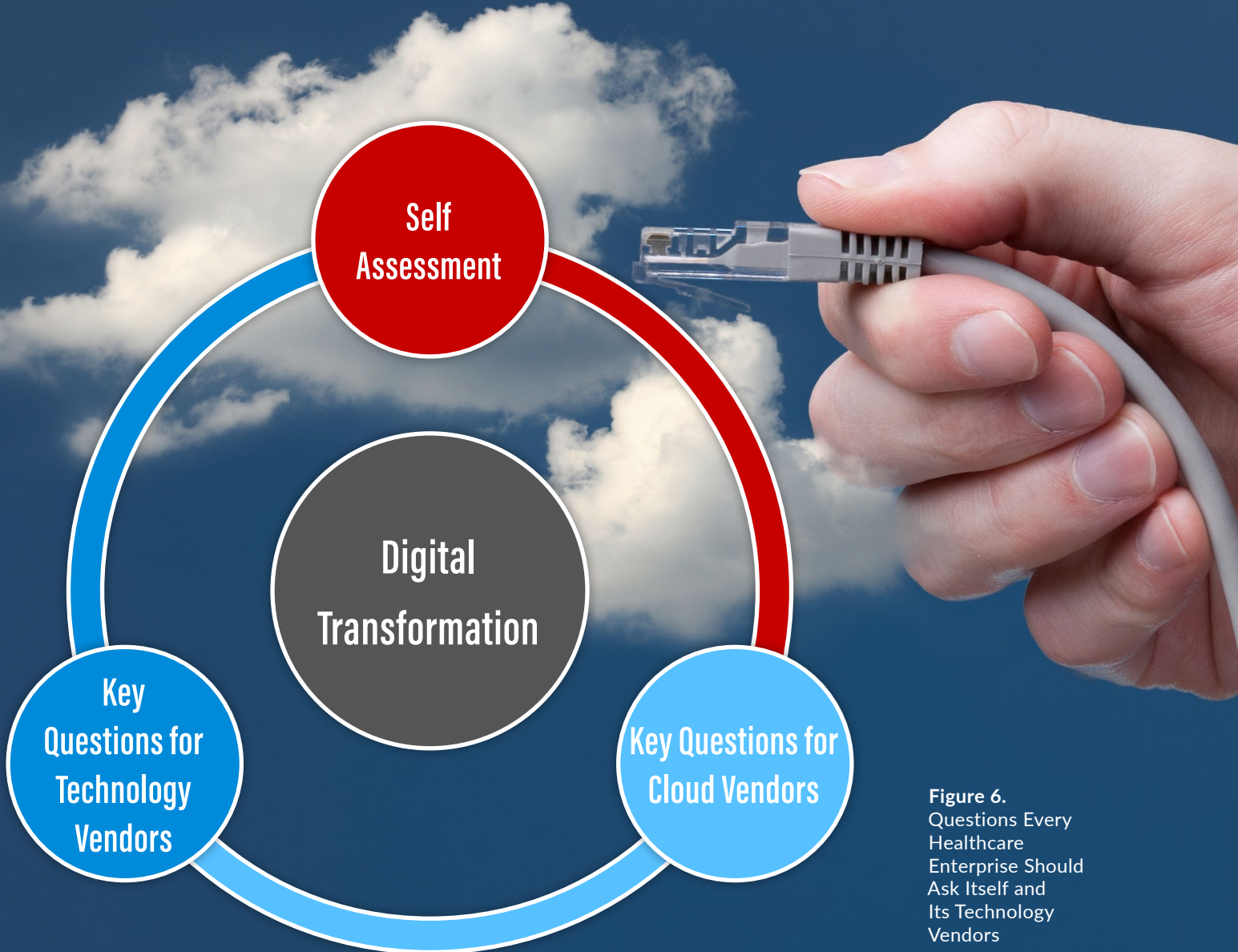


Figure 6.
Questions Every
Healthcare
Enterprise Should
Ask Itself and
Its Technology
Vendors

Healthcare Enterprise Self-Assessment:

- ☐ How can a Health Cloud contribute to our digital transformation strategy?
- ☐ How can we ensure that Health Cloud will improve our budgets and ongoing operating costs?
- ☐ How can we leverage a Health Cloud to improve our culture, processes, and practices?
- ☐ What obstacles to culture change are we likely to encounter?
- ☐ Does our workforce have the skills and experience needed to cloud-enable our digital transformation strategy? Which vendors can help our workforce get up to speed in cloud engineering?

Key Questions for Technology Vendors:

- ☐ Can we easily migrate our existing on-premises applications to the cloud?
- ☐ What are your product plans for cloud-enabling your offering?
- ☐ Can we manage your offering on our cloud vendor's infrastructure?
- ☐ Do we have the same configurability, programmability, and manageability options in the cloud that we have currently with your offering?
- ☐ Do we have more control of your offerings if we run in the cloud than we do currently?
- ☐ How can we evolve our use of your offering to take better advantage of cloud capabilities?
- ☐ How will you make your offering more extensible via APIs and partnerships?

Key Questions for Cloud Vendors:

- ☐ What steps will we need to take to ensure clean, computable, and complete data is available to support our digital transformation efforts? How will your company contribute to this effort? How much control over and visibility into the data integration, transformation, and preparation process will we have?
- ☐ How does your Health Cloud enable us to monitor, manage, and control the processes involved in creating clean computable data for our applications?

- Which healthcare-specific data standards does your offering support natively? How will you support emerging (e.g., FHIR) and future healthcare data standards?
- Can you provide fully managed end-to-end data integration and transformation from scores or hundreds of organizational and application sources? Can you provide us tools that we would use? Or Both?
- How can you support our internal developers and data scientists? What resources can they rely on?
- What kind of data science services do you offer? Can third parties contribute to our efforts to extract more value from our data?
- What kinds of commercial and open-source tools are available to use to develop AI or ML based algorithms and applications?

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