2016 European Healthcare Content Management Customer Value Leadership Award
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Background and Company Performance

Industry Challenges

Healthcare information technology (HIT) investments in applications such as electronic medical records (EMR), hospital information systems (HIS), and picture archiving and communication systems (PACS) have captured most of healthcare providers’ IT spending over the last few years. More recently, health systems’ focus has been shifting beyond these clinical applications, as they are seeking to implement a stronger data management foundation underlying these systems.

Realizing they need more than a mere aggregation of data silos, providers are looking for broader and more effective solutions for the ingestion, distribution, and lifecycle management of disparate datasets stemming from various parts of the healthcare enterprise. Indeed, basic data management solutions have fallen short of providing truly integrated patient and operational datasets that would be readily consumable and actionable for their clinical applications.

As the datasets generated by various HIT solutions continue to grow increasingly larger and more complex, the demand for easy and on-demand access from the multiple stakeholders in the healthcare enterprise is growing too. All of the clinical, IT and business stakeholders have started to embrace the ideal of a data-driven healthcare enterprise, where decision-making and patient-centric care are enabled through a holistic view of every piece of enterprise data on hand.

In this context, implementing an effective healthcare content management (HCM) strategy is increasingly demanding of advanced integration, customization, and a problem-solving approach on the part of vendors. In addition, providers seeking a real partnership with their HCM vendor now have higher expectations with regards to the strict reliance on industry standards, and the leverage of the latest in data security and data protection technologies.

Customer Impact and Business Impact

Price/Performance Value

BridgeHead Software started as a data management company more than two decades ago, in 1994, and soon began specializing in healthcare content management as its key area of expertise. Dedicated exclusively to the field of healthcare, the company has built a strong track record in the healthcare market through industry-leading solutions for data protection, archival, and disaster recovery for hospitals. Over the years, BridgeHead Software has continued to capitalize on these expert capabilities, evolving its offerings into a full-fledged portfolio that it provides today, including the third-generation vendor neutral archive (VNA) solution that the company prefers to call its Independent Clinical Archive (ICA). Under this next-generation model for healthcare content management
(HCM), BridgeHead extends its value proposition beyond medical images to encompass the broader gamut of multimedia and document content produced across the enterprise.

BridgeHead is recognized by its customers for the high performance and reliability of its solutions, and the effective delivery and pricing models carried out by the company. Indeed, BridgeHead’s Independent Clinical Archive consolidates data from any number of clinical departments including radiology, cardiology, pathology, oncology, and ophthalmology. As they pull up images of their patients, clinicians across these departments also benefit from seamless access to all related and relevant content such as priors and associated reports, regardless of type and location. BridgeHead’s solutions enable a centralized, high-performance data management environment across the healthcare enterprise, allowing a unified view of patient records through virtualization and compliance to standards protocols.

Customer Purchase Experience

In healthcare content management, no two customers are alike. Whether it is a regional health system or a stand-alone hospital, each customer’s needs and requirements vary widely in terms of depth and breadth of functionality. An HCM vendor’s success in offering a superior purchase experience stems from its dedication to understanding specific customer needs first, and designing customized solutions with a consultative and problem-solving approach. BridgeHead Software has matured its approach and capabilities with all types of healthcare providers, including those forward-thinking hospitals looking to address a specific need and approaching the company with a “data-first” frame of mind.

In the UK, the majority of healthcare providers that were part of the 10-year National Programme for IT (NPfIT) PACS framework had and, in some cases, still have a dire need to bring the data that was collected over the contract period back to the hospital, with the goal of centralizing in a vendor-neutral repository. These hospitals are faced with two major challenges—how to gain back ownership of the data, and how to streamline data management going forward. While some hospitals are addressing the challenge simplistically, many hospital trusts see this as an opportunity to elevate their data management best practices so that critical healthcare information can be made available to clinicians at the point of care. BridgeHead Software has been at the forefront of helping these hospitals bridge into next-generation HCM capabilities, while also providing the market with industry-leading data protection, information sharing, information lifecycle management and disaster recovery technologies.

BridgeHead Software complements its state-of-the-art technology with a high financial flexibility and customization element. The company offers its customers flexible purchasing options (such as capital purchasing, software-as-a-service (SaaS), managed services and other models) with price points tailored based on the scope and the amount of data (medical and non-medical images, clinical and administrative data), data migration (for the retirement of applications or repatriation of data), and professional services (such as data transformation).
Customer Service Experience

BridgeHead Software is capitalizing on the growing interest of hospitals for the ability to share data both intra- as well as inter-institutionally, among its various departments and also with other hospitals and healthcare organisations (such as primary care, social and community care). The company addresses these requirements by offering a base software package that is vendor-agnostic and that leverages previous IT infrastructure investments. The software is also application-agnostic and can work with both proprietary data solutions and open standards. Throughout the implementation and installation process, BridgeHead Software’s expert professional team support data migration and data transformation services while working with the clinical, imaging services, and the IT stakeholders.

A “train-the-trainer” approach to training services delivered through remote and in-person sessions allows the empowerment of customers and maximizes their ownership and autonomy. Aimed at industry-leading benchmarks, BridgeHead Software’s customer service is accessible around the clock throughout the year by a localized customer support team. The company has also been supporting, with great success, a managed services model whereby end-to-end data management services are handled by BridgeHead Software. Deeply engrained into the company’s culture is the customer-focused attitude that gives BridgeHead Software the ability to offer superior value-add services in a consistent manner.

Customer Acquisition

Over the last few years, BridgeHead Software has enjoyed significant growth in the EMEA healthcare market with its Independent Clinical Archive, HealthStore™, boasting a number of successfully completed projects and referenceable customers, including largescale implementations at Gateshead Health NHS Foundation Trust, Homerton University Hospital NHS Foundation Trust, North Middlesex University Hospital NHS Trust and Bradford Teaching Hospitals NHS Foundation Trust. This, combined with its extensive customer base built over the last two decades and having developed very sophisticated capabilities within its portfolio, has enabled BridgeHead Software to secure an enviable position for itself in the North American market as well. Representing the single largest market for healthcare content management globally, North America is poised to continue to be a major growth opportunity for BridgeHead Software. Through its tight and long-standing collaboration with MEDITECH, a leading vendor in the North American healthcare information systems (HCIS) market, BridgeHead Software technology is already utilized in approximately one in five hospitals across the United States.

As it continues to move ahead to develop its presence in North America, BridgeHead Software can tout significant unique selling points in the highly competitive and highly coveted North American HCM market having catered to major multi-site hospital systems with 500 to 1,000 beds and 1,000 to 3,000 employees. Indeed, BridgeHead Software has developed its capabilities allowing customers to extend their existing BridgeHead
investments to tackle other data challenges, e.g., augmenting their data protection environments with clinical archiving capabilities (HealthStore) for a more holistic data management strategy.

**High Growth Potential**

The proven scalability of its best-of-breed solutions, their true vendor-neutral, standards-based and hardware-agnostic nature, and the unique data protection element that BridgeHead Software provides are important differentiators notably in the North American market. Indeed, only a minority of health systems have already developed modern disaster recovery and business continuity (DR/BC) capabilities in those markets, which constitutes a major opportunity for BridgeHead Software to continue to gain attention and traction. The company’s ongoing collaboration with all major IT vendors, like MEDITECH, Dell, HP and NetApp and several PACS vendors such as Carestream Health, Insignia Medical Solutions, Agfa HealthCare, and Sectra, are also important enablers in this regard.

As it continues to move up-market and further to the front of the scene, BridgeHead Software is now armed with end-to-end data management capabilities for healthcare systems of all types, sizes and maturity levels. The company’s growth in Europe is attributable to its participation in the information management lifecycle from start to end, and the nimbleness of an entrepreneurial organization that reacts quickly to emerging market dynamics. As a result, the company’s growth in the HCM market has been gaining considerable momentum over the past 3 to 5 years, reinforced by a robust solutions portfolio and an ambitious roadmap.

**Conclusion**

Today, BridgeHead Software solutions enable over 1,200 hospitals across the globe with state-of-the-art healthcare content management capabilities. The company finds its strength in building strategic, long-standing partnerships with customers. Frost & Sullivan's independent analysis clearly shows that this high level of customer engagement translates into high customer satisfaction and loyalty, and growth both organically and within new markets. While it continues to position itself as a trusted advisor to its customers, BridgeHead Software remains one of the very few vendors that can deliver end-to-end data management solutions and industry-leading data protection and disaster recovery solutions.

In recognition of its strong overall performance, BridgeHead Software is the deserving recipient of Frost & Sullivan’s 2016 European Customer Value Leadership Award.
Significance of Customer Value Leadership

Ultimately, growth in any organization depends upon customers purchasing from your company, and then making the decision to return time and again. Delighting customers is therefore the cornerstone of any successful growth strategy. To achieve these dual goals (growth and customer delight), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by two macro-level categories: customer impact and business impact. These two sides work together to make customers feel valued, and confident in their products’ quality and long shelf life. This dual satisfaction translates into repeat purchases and a high lifetime customer value.
Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Customer Impact and Business Impact—according to the criteria identified below.

**Customer Impact**
- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

**Business Impact**
- Criterion 1: Financial Performance
- Criterion 2: Customer Acquisition
- Criterion 3: Operational Efficiency
- Criterion 4: Growth Potential
- Criterion 5: Human Capital

Best Practice Award Analysis for BridgeHead Software

**Decision Support Scorecard**

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation; ratings guidelines are illustrated below.

**RATINGS GUIDELINES**

The Decision Support Scorecard is organized by Customer Impact and Business Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criteria are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.
The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, Frost & Sullivan has chosen to refer to the other key players as Competitor 2 and Competitor 3.

**DECISION SUPPORT SCORECARD: CUSTOMER VALUE LEADERSHIP AWARD**

<table>
<thead>
<tr>
<th>Customer Value Leadership</th>
<th>Customer Impact</th>
<th>Business Impact</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>BridgeHead Software</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Competitor 3</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

**Customer Impact**

**Criterion 1: Price/Performance Value**
Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

**Criterion 2: Customer Purchase Experience**
Requirement: Customers feel like they are buying the most optimal solution that addresses both their unique needs and their unique constraints

**Criterion 3: Customer Ownership Experience**
Requirement: Customers are proud to own the company’s product or service, and have a positive experience throughout the life of the product or service

**Criterion 4: Customer Service Experience**
Requirement: Customer service is accessible, fast, stress-free, and of high quality

**Criterion 5: Brand Equity**
Requirement: Customers have a positive view of the brand and exhibit high brand loyalty

**Business Impact**

**Criterion 1: Financial Performance**
Requirement: Strong overall financial performance in terms of revenues, revenue growth, operating margin and other key financial metrics

**Criterion 2: Customer Acquisition**
Requirement: Customer facing processes support the efficient and consistent acquisition of new customers, even as it enhances retention of current customers

**Criterion 3: Operational Efficiency**
Requirement: Staff is able to perform assigned tasks productively, quickly, and to a high quality standard
**Criterion 4: Growth Potential**
Requirements: Customer focus strengthens brand, reinforces customer loyalty and enhances growth potential

**Criterion 5: Human Capital**
Requirement: Company culture is characterized by a strong commitment to quality and customers, which in turn enhances employee morale and retention

**Decision Support Matrix**
Once all companies have been evaluated according to the Decision Support Scorecard, analysts can then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

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**DECISION SUPPORT MATRIX: CUSTOMER VALUE LEADERSHIP AWARD**

<table>
<thead>
<tr>
<th>High Business Impact</th>
<th>High Customer Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>BridgeHead Software</td>
<td></td>
</tr>
<tr>
<td>Competitor 2</td>
<td></td>
</tr>
<tr>
<td>Competitor 3</td>
<td></td>
</tr>
</tbody>
</table>

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Low Business Impact | Low Customer Impact | High Customer Impact | High Business Impact
The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best in class positions in growth, innovation and leadership. The company’s Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.