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HOPPEN
TIME TO CARE

2020 GLOBAL ADVANCED INFOTAINMENT SYSTEMS FOR SMART HOSPITALS VISIONARY INNOVATION LEADERSHIP AWARD

Contents

Background and Company Performance

Industry Challenges

The global healthcare industry is transforming, from provider-centric to patient-centric, by focusing more on the outcomes and value of care delivered. Today, digital health solutions—tools and devices in the care continuum using information technology (IT) to exchange information between patients and other healthcare stakeholders—play a central role in the shift to value-based care. Over the last several years, digital health has resulted in a technology-based environment, with connected medical devices and clinical information systems (CIS)—including electronic medical record/electronic health record (EMR/EHR), centralized patient monitoring, and clinical decision support systems—increasing exponentially.

The connected ecosystem of sensors and devices around the patient serves to capture and measure information, identify and stratify risks, inform relevant stakeholders, make data-driven decisions, take evidence-based actions, and enhance patient comfort. Increasing penetration of these sensors in the clinical setting has led to the connected hospital vision—a fully integrated hospital where medical devices embedded with wireless technologies provide accurate patient monitoring while contributing to better patient experience and allowing for timely interventions. At the same time, physicians and caregivers can roam throughout the hospital.

The ability of hospitals to address patients' needs for better value of care strongly influences their competitiveness within their respective specialties. Also, hospitals have reimbursement pressures in a value-based care environment as patient satisfaction scores and hospital reviews impact payment. Therefore, healthcare institutions must adopt the appropriate technologies to improve the overall quality of care while still focusing on cost reduction efforts and an increased patient's experience.[1]

A further challenge comes from a change-averse mindset amongst parts of the medical community and a lack of awareness about the benefits of innovative digital solutions, which are an alternative for conventional approaches in healthcare. Therefore, Frost & Sullivan believes it is crucial to incorporate novel digital solutions up and down the value chain and create awareness of the benefits of these new technologies to become the "gold standard" for a patient-oriented approach.

Frost & Sullivan believes that digital health will play an essential role in healthcare treatment and management going forward. Emerging connectivity, information, and communications technologies have made digital health a crucial aspect in solving the challenges of managing healthcare requirements across the world.

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[1] *Breakthrough Technologies Building Superior Hospital Infrastructure, Evaluating the Role of Technologies in Designing and Upgrading Future Hospital Infrastructure*, (Frost & Sullivan, March 2019).

Focus on the Future and Best Practices Implementation of Hoppen

Commitment to Enhance the Patient's Experience while Digitalizing the Hospital Ecosystem

Headquartered in Cesson-Sévigné, France, Telcom Sante which was founded in 2011 became Hoppen in November 2018 for the initiative of international expansion. Hoppen leverages almost a decade of experience to enable digital transformation in healthcare institutions. The company works with customers to provide reliable software solutions responding to the global healthcare system's evolving challenges. Hoppen supports healthcare facilities by using digital tools to improve patient services, smooth internal processes, and optimize staff's daily tasks.

Initially, the company was focusing only on the patient entertainment space, but then Hoppen understood process complexities inside a medical facility and the need to digitalize and streamline practices for all stakeholders' convenience. As a result, the company introduced its flagship bedside multimedia screen—MediaScreen, a screen dedicated to patients primarily. Using MediaScreen, they can watch TV and movies, play gaming applications, listen to preferred music, or stay informed on world news while getting through media sources. Also, patients can keep in touch with relatives while leveraging social media. As a result, Hoppen reports 87% of patients and their relatives are satisfied with MediaScreen.

Nevertheless, the MediaScreen value comes not only from entertainment features, but also from making patients more independent and engaged with caregivers, nurse stations, and hospital staff—making it convenient for all involved. These features give the solution a significant differentiator against competitors. Furthermore, the solution is extremely suitable for medical staff since doctors and nurses have convenient access to the patient's EHR/EMR at the point-of-care. Hoppen digitalizes and makes this process less time-consuming as it eliminates the need for paperwork and doctors' consultations on previous procedures.

Also, MediaScreen brings value to the healthcare facility and staff by saving time and simplifying bedside management—Hoppen states 70% time saved on facility management and around 90 minutes saved by the care team daily. MediaScreen allows for quick operations on processes such as bio cleaning management, technical incidents notification and reporting, smart badge authentication, and bill payments. Additionally, it eases catering management and logistics. Since this process is paper-less, the patient can choose the appropriate meals directly at the point-of-care according to their diet and meal preferences, making it convenient for the patient and allowing nurses to focus on other crucial patient care activities.

With a focus on the constant development, Hoppen aims to facilitate the entire patient path before, during, and after hospitalization. Therefore, the company introduced a robust suite of customizable, stand-alone, and mutually compatible digital solutions for making a patient's stay more convenient while ensuring the highest care standards.

Hoppen's Suite of Digital Solutions
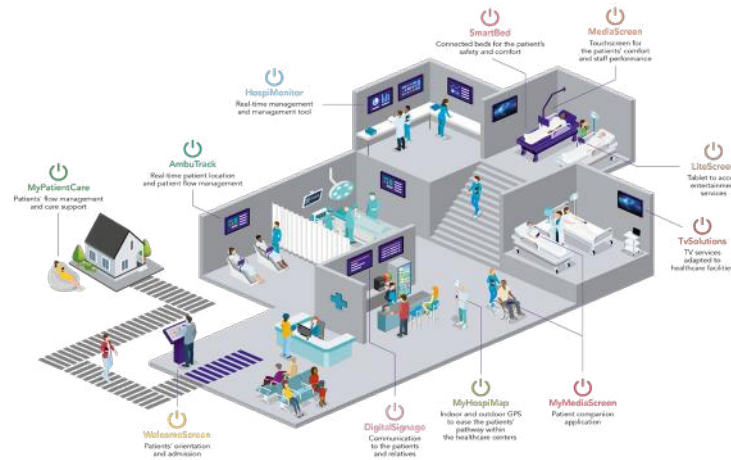
Source: Hoppen

Apart from the remarkable MediaScreen, strengthened with LiteScreen, TvSolutions, and MyMediaScreen, the suite includes WelcomeScreen—simplifies the patient's admission process, MyHospiMap—guides patients within the healthcare facility, and superior AmbuTrack—real-time patient location and patient flow management.

One of the biggest market differentiators is Hoppen's AmbuTrack, a unique solution designed to improve patient comfort while enhancing patient safety, decreasing waiting time by 50%, and reducing hospitalization stress. The solution delivers value for the healthcare facility as it optimizes the patient's journey, productivity gains (Hoppen reports saving around an hour for the staff every day), and improves overall ambulatory processes while increasing patient intake by 20%. AmbuTrack reinforces the bond between patients and care providers and improves the quality of care by delivering real-time patient tracking, simplifying patient flow management, and improving planning management.

MyPatientCare application manages all stages of a patient journey—administrative, medical, services, bill payment—enhancing patient's flow management and ensuring direct patient and hospital staff contact, further strengthening Hoppen's solutions.

Remarkable International Expansion with Potential for Further Growth

After years of successful performance solely in the French market, Hoppen paid a particular focus on further growth and internationalization. While adapting its solutions for different markets, the company was able to penetrate four different countries at once, without any previous references in these regions.

Today, Hoppen leverages its international business network and references in over 16 countries in Europe, the Middle East, Africa, and North America, with over 150 sites globally while being present not only in private hospitals but also in public ones.

The company receives positive testimonials from Swiss public and private clients such as the University Hospital Zurich and Clinica Hildebrand in Brissago. Hoppen is also present in the Middle East region, gaining valuable testimonials form a private hospital in Dubai and the King Abdulaziz University Hospital in Riyadh, Saudi Arabia.

The company nurtures close relationships with customers to understand their needs and the market shifts they experience. Thus, product functionality corresponds to the real needs of end-users. Furthermore, Hoppen remains informed and close to its customers' experienced needs and collects their feedback, shares best practices, and drives industry-wide innovations for broader customer success. Furthermore, the company partners with the key players in the healthcare industry. Collaborations include Siemens (working on joint projects in France and Switzerland), Hill-Rom (delivering the value from SmartBed solutions in hospitals which collects patient's data and makes it available for EMR and nurse stations), and Barco (working on imagining and screening applications).

Hoppen, thus, drives its further growth and recently secured €32 million from investors, including Geneo Capital Entrepreneur, Unexo, and Kreizig Invest.[2] Furthermore, the company has acquired French-based Télécom Services, an operator of digital TV services for hospitals. This strategic decision and powerful synergy of solutions, human resources, and ideas will help develop unique solutions in the market while speeding up digitization in healthcare facilities.

To accelerate its business development, as well as to strengthen its brand equity, Hoppen focuses on strategic communication with customers, partners, investors, and media, helping educate them about its innovative technologies. One of the company's most important goals is to show the medical community a reliable project, providing them an excellent opportunity to invest. Hoppen believes that its Digital Hospital solutions have the potential to support over 2.7 million patients each year globally while optimizing healthcare facilities' performance and saving around €220,000 per facility per year.

The company's successful history of operation additionally strengthens its credibility and marks its wealth of experience. Frost & Sullivan believes that Hoppen is well-positioned to provide the solutions to respond to actual challenges faced by patients and medical facilities while strengthening its growth potential across the globe.

[2] *GENEO participates in the HOPPEN adventure,* https://geneocapitalentrepreneur.com/en/geneo-participe-a-laventure-hoppen/, accessed March 2020

Conclusion

The global healthcare industry is transforming from provider-centric to patient-centric by focusing on the outcomes and value of care delivered. Responding to this trend, Hoppen improves the patient experience with its 'infotainment' solutions while improving overall hospital performance by reducing the workload of professionals, simplifying internal processes, optimizing daily care activities, and achieving cost reductions. The company introduced a robust suite of digital solutions for the whole smart hospital ecosystem that are customizable, modular for stand-alone operation, as well as interoperable with the existing systems for facilitating the entire patient path before, during, and after hospitalization. Hoppen works directly with private and public hospitals and promptly responds to the customer needs through its continual product development, providing best-in-class quality and support.

With its admirable focus on constant evolution and value-driven innovations, Hoppen earns Frost & Sullivan's 2020 Global Visionary Innovation Leadership Award in the advanced infotainment systems for the smart hospital industry.

Significance of Visionary Innovation Leadership

A Visionary Innovation Leadership position enables a market participant to deliver highly competitive products and solutions that transform the way individuals and businesses perform their daily activities. Such products and solutions set new, long-lasting trends in how technologies are deployed and consumed by businesses and end users. Most important, they deliver unique and differentiated benefits that can greatly improve business performance as well as individuals' work and personal lives. These improvements are measured by customer demand, brand strength, and competitive positioning.

Understanding Visionary Innovation Leadership

Visionary Innovation is the ability to innovate today in the light of perceived changes and opportunities that will arise from Mega Trends in the future. It is the ability to scout and detect unmet (and as yet undefined) needs and proactively address them with disruptive solutions that cater to new and unique customers, lifestyles, technologies, and markets. At the heart of visionary innovation is a deep understanding of the implications and global ramifications of Mega Trends, leading to correct identification and ultimate capture of niche and white-space market opportunities in the future.

Key Benchmarking Criteria

For the Visionary Innovation Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Focus on the Future and Best Practices Implementation—according to the criteria identified below.

Focus on the Future

Criterion 1: Focus on Unmet Needs
Requirement: Implementing a robust process to discover customers' unmet or underserved needs and create the products or solutions to address them effectively.

Criterion 2: Visionary Scenarios through Mega Trends
Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling first-to-market growth opportunity solutions

Criterion 3: Growth Pipeline
Requirement: Best-in-class process to identify and prioritize growth opportunities leveraging both internal and external sources.

Criterion 4: Blue Ocean Strategy
Requirement: Strategic focus on creating a leadership position in a potentially uncontested market space, manifested by stiff barriers to entry for competitors.

Criterion 5: Growth Performance
Requirement: Growth success linked tangibly to new growth opportunities identified though visionary innovation.

Best Practices Implementation

Criterion 1: Vision Alignment
Requirement: The executive team is aligned with the organization's mission, vision, strategy, and execution.

Criterion 2: Process Design
Requirement: Processes support the efficient and consistent implementation of tactics designed to implement the strategy.

Criterion 3: Operational Efficiency
Requirement: Staff performs assigned tasks seamlessly, quickly, and to a high quality standard.

Criterion 4: Technological Sophistication
Requirements: Systems enable companywide transparency, communication, and efficiency.

Criterion 5: Company Culture
Requirement: The executive team sets the standard for commitment to customers, quality, and staff, which translates directly into front-line performance excellence.

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Awards follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP		OBJECTIVE	KEY ACTIVITIES	OUTPUT
1	Monitor, target, and screen	Identify Award recipient candidates from around the globe	• Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies	Pipeline of candidates who potentially meet all best-practice criteria
2	Perform 360-degree research	Perform comprehensive, 360-degree research on all candidates in the pipeline	• Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates	Matrix positioning of all candidates' performance relative to one another
3	Invite thought leadership in best practices	Perform in-depth examination of all candidates	• Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps	Detailed profiles of all ranked candidates
4	Initiate research director review	Conduct an unbiased evaluation of all candidate profiles	• Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles	Final prioritization of all eligible candidates and companion best-practice positioning paper
5	Assemble panel of industry experts	Present findings to an expert panel of industry thought leaders	• Share findings • Strengthen cases for candidate eligibility • Prioritize candidates	Refined list of prioritized Award candidates
6	Conduct global industry review	Build consensus on Award candidates' eligibility	• Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates	Final list of eligible Award candidates, representing success stories worldwide
7	Perform quality check	Develop official Award consideration materials	• Perform final performance benchmarking activities • Write nominations • Perform quality review	High-quality, accurate, and creative presentation of nominees' successes
8	Reconnect with panel of industry experts	Finalize the selection of the best-practice Award recipient	• Review analysis with panel • Build consensus • Select recipient	Decision on which company performs best against all best-practice criteria
9	Communicate recognition	Inform Award recipient of Award recognition	• Present Award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance	Announcement of Award and plan for how recipient can use the Award to enhance the brand
10	Take strategic action	Upon licensing, company is able to share Award news with stakeholders and customers	• Coordinate media outreach • Design a marketing plan • Assess Award's role in future strategic planning	Widespread awareness of recipient's Award status among investors, media personnel, and employees

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.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS

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 more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.