Patient Care and Clinical Informatics

Deborah DiSanzo
EVP and GM Patient Care and Clinical Informatics
Patient Care and Clinical Informatics

**People focused**

Drive monitoring everywhere.

**Care cycle driven**

Lead in clinical decision support applications.

**Care anywhere**

Accelerate mobility and seamless interoperability.

**Meaningful innovation**

Be the first choice in emerging markets. Delight customers through effective solutions delivery.


**Strategic Intent** We provide clinical informatics and patient care solutions that simplify clinician workflow, improve financial outcomes, and help improve and save lives.
## Growth and recognition

### Patient Care and Clinical Informatics market

<table>
<thead>
<tr>
<th>2010</th>
<th>Patient monitoring</th>
<th>Clinical informatics</th>
<th>Therapeutic care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market size</td>
<td>€ 2.5B</td>
<td>€ 2.5B</td>
<td>€ 3.0B</td>
</tr>
<tr>
<td>Market growth</td>
<td>3 - 4%</td>
<td>5 - 6%</td>
<td>6 - 7%</td>
</tr>
</tbody>
</table>
|               | • #1 leadership position  
               | • 46% represents twice market share of closest competitor | • Gaining share 
               | • #1 in Cardiology PACS and Critical Care Informatics 
               | • #7 globally among health care informatics solutions providers | • Gaining share in non-invasive ventilation 
               |                                   | • Acquired Dameca, anesthesia solutions 
               |                                   | • Successfully integrated Respironics Hospital |

### Nov 2010
**Synergies understood: Millennium Research**

Unlike most competitors, Philips has been able to succeed in the critical care informatics market due to its strong foothold in patient monitoring devices. **Selling both monitors and information systems creates strong synergies** for sales of both product lines, especially because patient monitors are a core business for the company.

### Jan 2011
**Customer satisfaction kudos: MD Buyline**

- #1 Hemodynamic and Physiologic Monitoring
- #1 Radiology PACS
- #1 Cardiology PACS

### Dec 2010
**Best in KLAS rank rising: Overall software vendor**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EPIC</td>
</tr>
<tr>
<td>2</td>
<td>PICIS</td>
</tr>
<tr>
<td>3</td>
<td>Philips</td>
</tr>
<tr>
<td>4</td>
<td>3M</td>
</tr>
<tr>
<td>5</td>
<td>Care Fusion</td>
</tr>
<tr>
<td>6</td>
<td>Sunquest</td>
</tr>
<tr>
<td>7</td>
<td>Merge Healthcare</td>
</tr>
<tr>
<td>8</td>
<td>McKesson</td>
</tr>
<tr>
<td>9</td>
<td>Cerner</td>
</tr>
<tr>
<td>10</td>
<td>Siemens</td>
</tr>
</tbody>
</table>
New game-changing patient monitoring solutions

**Mobility:**
Innovation in wireless solutions and mobile applications

Helping improve care on general floors, contributing to patient safety, and improved clinician workflow

**New**
- Cable-less monitoring
- Mobile applications

**Clinical Decision Support:**
Innovation in predictive algorithms

Tremendous commercial success and high market acceptance

**New**
- MX800 with embedded PC
- MP5 spot check with early warning scoring

**Interoperability:**
Innovation in systems design and information exchange

Systems integration enables intelligent information presentation when, where, and how it’s needed within customers’ environment

**New**
- Philips Information Center
New game-changing clinical informatics

**Mobility and collaboration**
Among imaging specialists and referring physicians

**New**
- IntelliSpace PACS peer review
- IntelliSpace Perinatal
- IntelliSpace Critical Care

**Advanced clinical decision support**
Leadership in the fields of advanced visualization and image analytics

**New**
- IntelliSpace PACS multi-modality 3D
- Digital pathology, first installs
- IntelliSpace Integral Breast

**Clinical workflow and interoperability**
Advances in systems integration and cross-ology applications -- oncology, women’s health, and radiology

**New**
- IntelliSpace PACS workflow layer – iSite
- IntelliSpace PACS communication tools – iSite
- IntelliSpace PACS virtualization – iSite

Radiology, cardiology, pathology, …any-ology
Leading in interoperability and standards

Eliminating disparate connections to clinical systems within our customers’ environments, to and from the EHR. Demonstrated leadership with over 20 chair and co-chair positions on industry standards committees.

One pipe to the Electronic Medical Record

Three boxes with headers:
- PACS
- Cath Lab
- Anesthesia
- ICU
- ECG Management
- Device Data
- Ultrasound
- Clinical Benchmarking
- ED
- Pre-Hospital
- Home Monitoring
- OB System
- Clinical Images
- NICU Vermont Oxford Registry
- PICU Outcomes Registry
- Tumor Registry
Leading in telehealth

Coordinating care, helping to reduce length of stay and hospital readmissions

Leverage scarce clinician resources to care for more patients across all care areas

Use clinical decision support applications for proactive patient and population management

Enable information exchange with EHRs and customers’ informatics environment

Extend hospital to home helping to coordinate patient discharge and reduce readmissions
Innovation in telehealth with IntelliSpace eICU

Telestroke
Gaining share and leadership in key businesses and markets

<table>
<thead>
<tr>
<th>China</th>
<th>India</th>
<th>Brazil</th>
<th>North America</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient Monitoring</strong></td>
<td><strong>Patient Monitoring</strong></td>
<td><strong>Patient Monitoring</strong></td>
<td><strong>Patient Monitoring</strong></td>
</tr>
<tr>
<td>• #1 in critical care in level III hospitals</td>
<td>• #1 in patient monitoring</td>
<td>• #1 in patient monitoring</td>
<td>• #1 in patient monitoring</td>
</tr>
<tr>
<td>• #1 in women’s health colposcopy</td>
<td>• Grew 33% in value segment</td>
<td>• Outgrew the market and gained two share points in 2010</td>
<td>• All patient monitoring solutions now integrated into HIS and EMR</td>
</tr>
<tr>
<td>• Grew 40% in 2010, significantly outpacing key competitors</td>
<td>• Grew 17% overall in 2010</td>
<td></td>
<td>• Expanding eICU concept to eHospital and into hospital-to-home</td>
</tr>
<tr>
<td><strong>Clinical Informatics</strong></td>
<td><strong>Clinical Informatics</strong></td>
<td><strong>Clinical Informatics</strong></td>
<td><strong>Clinical Informatics</strong></td>
</tr>
<tr>
<td>• Organic development in EMR, radiology, and cardiology</td>
<td>• Organic development in EMR, radiology, cardiology, mobility, and interoperability</td>
<td>• Brodest clinical informatics portfolio and 340 installations</td>
<td>• Veterans Administration Veterans Integrated Service Network (VISN) 10</td>
</tr>
<tr>
<td>• Winning deals in level 3 hospitals with CDP PACS and critical care informatics</td>
<td>• Acquisition of Tecso Informática</td>
<td>• Acquisition of Wheb Sistemas</td>
<td>• VA VISN 23 eICU</td>
</tr>
<tr>
<td><strong>Resourcing to win</strong></td>
<td><strong>Resourcing to win</strong></td>
<td><strong>Resourcing to win</strong></td>
<td><strong>Resourcing to win</strong></td>
</tr>
<tr>
<td>• Hiring 165+ in sales, service, and R&amp;D</td>
<td>• Hiring 100+ R&amp;D engineers</td>
<td>• Hiring 100+ in sales, service, and R&amp;D</td>
<td>• Expanding clinical transformation services and CDS consulting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Hospital to home

**Strategy**

**Home**

**Chronically ill patients and their families**
We empower patients and their families with personalized information and tools to help them understand their hospital discharge and adhere to ongoing care.

**Hospital**

**All members of the care team**
We help caregivers treat a growing number of patients by providing the information and tools they need to confidently and efficiently deliver high-quality humanistic care across the continuum.
Key takeaways

Accomplishments to date

• We have established ourselves as a leading patient care and clinical informatics solutions provider
• We are leading in interoperability, mobility, and clinical decision support
• We are building leadership in patient care and clinical informatics in growth geographies

Now taking it to the next level

• Philips will lead with holistic, connected, innovative solutions – from hospital to home