



**PHILIPS**


Healthcare Informatics



# Selling the Healthcare Informatics portfolio

## **Competitor knowledge book: Fujifilm**

November 2017  
Version 1.0



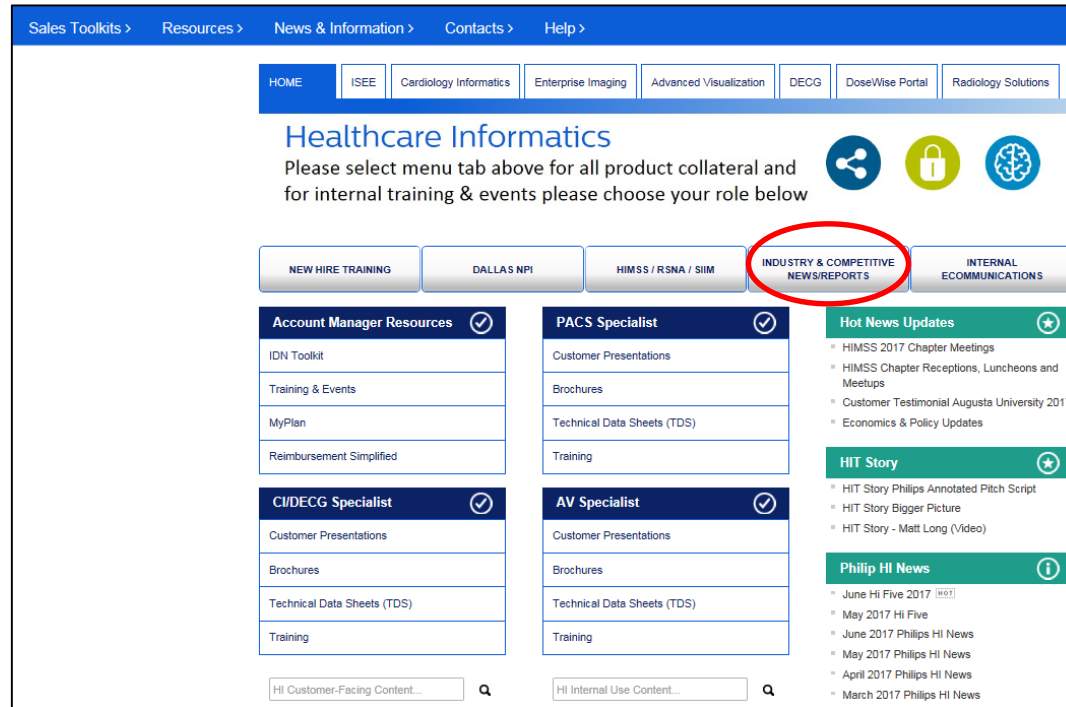
## Introduction

- This playbook is intended to be utilized by the North America Sales HI Account Managers in competitive positioning with account strategy development. **It is for internal use only and should not be distributed outside of Philips.**
- This playbook has been designed to provide relevant information so you can successfully promote and sell our solutions as well as understand and exploit areas of competitive weakness.
- This document is a living document and updates will be provided at least twice year or should important competitive dynamics or events occur.
- Actual field experiences provide true depth in understanding and we encourage all users of this material to provide additional insights to the field marketing team as they occur.
- Further details and additional information can be found on the Healthcare Informatics landing page of the Philips One Source portal - [Healthcare Informatics NA OneSource Landing Page](#)

Best regards and good selling,  
**Your North America Field Marketing and Market Support Team**

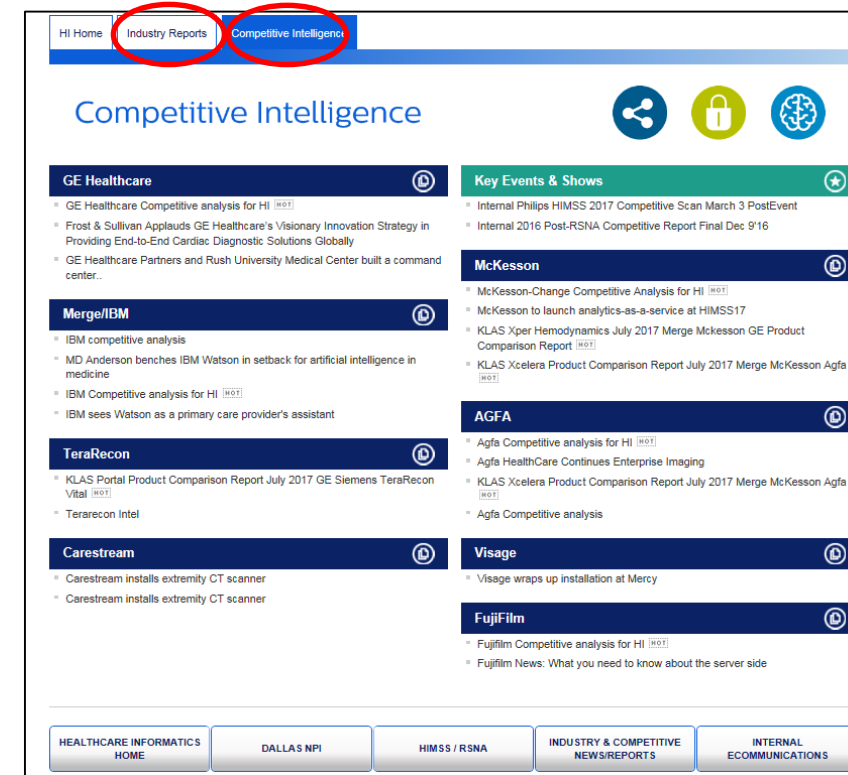
# Market and competitive intelligence

- The latest quarterly KLAS reports comparing Philips HI NA solutions vs. competitors can be found on the NA OneSource webpage for Healthcare Informatics
- For access or support needs contact: [hi.onesource@philips.com](mailto:hi.onesource@philips.com)



## Step 1

- Log into OneSource and navigate to the “Healthcare Informatics NA” landing page
- Then click on the “Industry and Competitive News & Reports” link



## Step 2

- Yearly KLAS, MD Buyline, and other reports can be found in the “Industry Reports” section
- Click on “Competitive Intelligence” to see details by competitor including the latest copies of competitive attack/defend playbooks





Philips strategy:  
We aim to **capture growth**  
and **create value**

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## A side-by-side comparison

# Value proposition comparison

Philips offers a much deeper and wider set of offerings that span healthcare informatics and the greater healthcare enterprise

## Philips

### Integrated Healthcare Informatics for enhanced patient care

Every day, you're inundated with clinical data. Our healthcare informatics solutions have the power to transform this data into integrated information that can help guide patient care throughout your enterprise.

Our medical informatics solutions streamline management and analysis of patient data from imaging systems, patient monitors, and cardiac testing equipment, while also offering innovations that enhance clinical pathways and aid workflow. By connecting hospital information systems, you gain easy access to aggregated data across the patient care continuum, helping you to gain visibility into the overall health of a patient and proactively manage population health.



#### Connected

An interoperable and extensible healthcare informatics platform to enhance patient-centric care – from a trusted partner



#### Secure

Vigilance with the latest data security and patient privacy demands without compromising accessibility or your investment



#### Intelligent

Automated workflows, advanced visualization and stronger clinical collaboration

## FUJIFILM

Value from Innovation

### Medical Informatics

Fujifilm has redefined its corporate mission, vision, and values, and at the core is our commitment to create superior healthcare experiences for our customers and their patients.

Fujifilm's comprehensive portfolio showcases technologies designed to establish the ideal Enterprise Imaging strategy. Explore all offerings to validate the ultimate decision to partner with a company dedicated to collaboration on behalf of patient care.

The Synapse® Enterprise Imaging solution – including technologies like VNA, PACS, RIS, CVIS, 3D, and Enterprise Viewer – was designed for true imaging interoperability. It provides secure, easy-to-manage storage and access to the complete patient imaging record and links all healthcare IT systems across diagnostic departments – allowing individual physicians immediate access whenever and wherever they need it.

### Medical systems

Medical Informatics  
Digital X-ray  
Digital Mammography  
Private practice  
Endoscopy  
Education  
Services  
Customer stories  
Technical Documents  
Customer portals

### A comprehensive portfolio tailor-made for Enterprise imaging



VNA



PACS



RIS



3D



Cardiovascular



Cloud

# Portfolio comparison – Philips view

We are stronger both in the breadth and depth of our offerings

Philips



Managed service (ISEE)	Radiology PACS	IntelliSpace PACS – See attack section	
	Advanced Workflow Orchestration	See IntelliSpace Radiology Workspace Solution NPI materials and attack section	Offers inherent robust workflows in Synapse 5 and expanded workflow management with Fuji Clinical Workflow Manager.
	Radiology Analytics	See IntelliSpace Radiology Analytics NPI materials and attack section	Synapse Analytics available through the Synapse RIS
	Enterprise Imaging/ Visible Light	IntelliSpace Visible Light Capture	Mobile VL offering with integration Synapse VNA and EPIC
	VNA	IntelliSpace Universal Data Manager – See NPI materials	VNA via TeraMedica acquisition
	Universal Viewer	Leverage roadmap via field marketing if this is a challenge	Not explicitly promoting a universal viewer, however, does promote a single viewing environment
	AI Offering	Illumeo – see NPI materials (currently for radiology only)	No indication of an offering or strategic direction
	Cardiology CVIS	IntelliSpace Cardiovascular – See attack section. Leverage connections with IGT-S, DXR, US	Mostly Echocardiography vs. full CVIS deployment (see KLAS details)
	ECG Management	IntelliSpace ECG and ECG devices – See attack section.	Must partner; epiphany for ECG IT or Mortara for ECG Equipment
	Hemodynamics	Xper Information Management with Xper Flex Cardio – See attack section. Leverage connections with IGT & PIICiX/IntelliVue.	Does not offer Hemo; Must partner
	Advanced Visualization	IntelliSpace Portal – See attack section	No standalone AV; not ranked in KLAS; less applications
	Dose Management System	DoseWise Solutions for patient/staff radiation safety. Work with field marketing for add'l information.	No comparable offering
Core	Imaging Modalities (CT, MR, US, DR)	Align with DI and AE teams	Present only in diagnostic X-ray and US, no x-sectional imaging
	Patient Monitoring	Align with AE and Patient Monitoring teams	No comparable offering
Emerging areas	Genomics	IntelliSpace Genomics. Work with field marketing for more information.	No apparent offering
	Oncology	Emerging: Ask field marketing for roadmap help, if required	Addressed only through its VNA; unclear offering
	Pathology	IntelliSite Pathology Solution. Work with field marketing for more information or Digital Path sales team.	No comparable offering
	Population Health	Align with the Philips WellCentive team	No comparable offering

Coloring is a qualitative indication of product/portfolio strength (green– strong; yellow – emerging capability; red – weak)

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# Solution set comparison

We are stronger both in the breadth and depth of our offerings

## IntelliSpace solutions

Philips IntelliSpace Solutions help simplify clinical workflow, provide economic value, and improve patient care across entire health systems. Make informed decisions with confidence.

### Radiology

[Illumeo](#)

Changing how you see, seek and share clinical information

[IntelliSpace PACS Radiology Workspace Solution](#)

Efficiency or quality? Choose both

[IntelliSpace PACS iVault](#)

PACS archive solution

[IntelliSpace Universal Data Manager](#)

Interoperable archiving and management solution for the healthcare enterprise

[IntelliSpace PACS Advanced Mammography](#)

Streamline the review of diagnostics mammography studies

[IntelliSpace PACS Anywhere](#)

Mobile platform image distribution

[IntelliSpace PACS Federation](#)

PACS archive solution

[IntelliSpace VL Capture](#)

Visible light workflow tool

[IntelliSpace Radiology Analytics](#)

Tuning complex data into clear decisions

### Cardiology

[IntelliSpace Cardiovascular](#)

Integrated multimodality image and information system designed to perform the necessary functions in cardiology.

[Xper Information Management with Xper Flex Cardio](#)

Cardiovascular workflow solution

[IntelliSpace ECG](#)

ECG Management Solution

### Advanced Visualization

[IntelliSpace Portal](#)

Multimodality advanced visual analysis solution

Over 70 clinical applications for Cardiology, Neurology, Oncology, Vascular, Pulmonary imaging

### Radiation dose management

[Philips DoseWise](#)

Radiation dose management software platform for healthcare providers to record, track and analyze radiation exposure to patients and clinicians.

### Managed service

[Philips IntelliSpace Enterprise Edition](#)

## Synapse solutions

A comprehensive portfolio tailor-made for enterprise imaging.

### Radiology

[Synapse VNA](#)

With over 16 years of industry-leading experience, our TeraMedica Division remains independently focused on advancing VNA technology and healthcare interoperability while also leveraging our clinical capabilities. As the centerpiece of the FUJIFILM Medical Systems U.S.A., Inc.'s comprehensive enterprise imaging portfolio, Synapse VNA provides the industry's leading image-management solution.

[Synapse PACS](#)

The Synapse 5 server-side imaging architecture is the evolution of our enterprise imaging platform influenced by 20 years of experience. FUJIFILM Medical Systems U.S.A., Inc., is the only large imaging company with the portfolio and underlying architecture to provide a true single-vendor enterprise-imaging solution. Imaging will always be a critical part of patient care, and we will be there

[Synapse RIS](#)

A full-featured, Web-based radiology management system that is fully integrated with Synapse PACS and has complete EHR certification for

Meaningful Use in radiology

[Synapse Cloud Services](#)

Cloud Services for imaging informatics is your trusted partner, with the technical and clinical expertise to host and manage your enterprise Synapse solutions. We offer a scalable environment with guaranteed reliability. Large enterprises and IDNs benefit from off-site storage and disaster recovery. Critical-access hospitals, imaging centers, and teleradiology providers can take advantage of our cloud-based infrastructure and bundling of software to maximize efficiency and cost savings.

### Cardiology

[Synapse Cardiovascular](#)

Developed with direction from cardiologists, Synapse Cardiovascular offers capabilities and tools that help streamline workflow, image review, and reporting for a variety of cardiac areas.

### Advanced Visualization

[Synapse 3D Advanced Visualization Software](#)

Embedded capabilities of Synapse (limited)

Access Synapse 3D in a single click from any Synapse PACS client. Simple, relevant and comprehensive analysis conveniently accessed at your workstation - wherever you are.

### Radiation dose management

No explicit offering

### Managed service

No explicit offering



# Selling against Fuji

## **Radiology informatics**

# Selling against Fuji

## IntelliSpace PACS: attack strategy – business model

Features	Advantages	Benefits
Unique managed service	All-inclusive contract with transparent total cost of ownership	<ul style="list-style-type: none"> <li>• Reduces the costs and risks of system acquisition and guarantees system performance</li> <li>• Known and predictable costs for the period of the contract (Predictable budgeting)</li> <li>• Financially aligned incentives for growth and uptime</li> <li>• Built-in on-demand scalability allowing you to add users, workstations, modalities, exams, applications, and facilities as needed</li> <li>• Includes software upgrades and hardware obsolescence protection</li> <li>• Supports continual innovation throughout your investment</li> <li>• Contractually committed monthly uptime guarantee of 99.9% or 99.99%</li> <li>• Three-second image access guarantee</li> </ul>
Fee-per-study model	Operational expense vs. capital purchase	<ul style="list-style-type: none"> <li>• Align spend directly with usage (CIO/CFO/Management)</li> <li>• Business model flexibility depending on the customer's financial situation and needs</li> </ul>
Proactive service and support	Rapid response to issues at any time	<ul style="list-style-type: none"> <li>• Faster resolution of issues and focus on the customer's business goals, which leads to more efficient patient care. Our standard proactive service includes: <ul style="list-style-type: none"> <li>• 24x7x365 proactive monitoring system with Live Tech Support</li> <li>• Support services included in all contracts</li> <li>• Automated backups with off-site disaster recovery</li> </ul> </li> </ul>
Open platform for integration with third party solutions	Easily interface with a broad range of EMRs, third-party and customer-developed solutions	<ul style="list-style-type: none"> <li>• Choice of best of breed tools from Philips, third-party vendors, and homegrown</li> <li>• Allows you to design and customize your environment based on your specific needs, leading to increased workflow efficiency and productivity</li> </ul>
Enterprise Imaging platform	Manages a wide array of patient images and data in a secure, standards-based environment	<ul style="list-style-type: none"> <li>• Common viewing platform for enterprise imaging needs, including Radiology, Cardiology, Mammography, Visible Light, and more</li> <li>• It offers the clinical intelligence and workflow, scalability, and performance of a traditional PACS along with the interoperability, standards-based environment, and universal image management of a VNA, all in a secure environment</li> </ul>

# Selling against Fuji

## IntelliSpace PACS: attack strategy – clinical workflow (Target audience - Department chair)

Features	Advantages	Benefits
Advanced workflow orchestration	Empowers radiologists to manage their work more efficiently	<ul style="list-style-type: none"> <li>• Empower your radiologists to meet specific clinical and business goals, and better serve the referring community</li> <li>• Reduce or even eliminate the need for (costly) third-party workflow orchestration solutions</li> </ul>
Clinical intelligent software, leveraging Adaptive Intelligence  <a href="#">Illumeo</a>	Augments the skills of your clinicians, redefining how they currently interface with images	<ul style="list-style-type: none"> <li>• Delivers a tailored workflow experience as it adapts to the context and to the user preferences</li> <li>• Assists physicians with best practices to help standardize care</li> <li>• Produces a more meaningful, insight-rich output that can help physicians get to the right decision for their patients and improve care</li> <li>• Improves collaboration between departments within the hospital and with referring physicians</li> </ul>
Mammography with tomosynthesis	Advanced Mammography reading from your IntelliSpace PACS Radiology workstation provides a single point of access for a holistic view of your patient's medical history	<ul style="list-style-type: none"> <li>• Seamless radiologist reading workflow with digital tools designed for screening, diagnostics, and digital breast tomosynthesis review</li> <li>• Removes the need for dedicated mammography reading workstations, reducing cost, saving time, and creating space and flow in the radiologist workspace</li> <li>• Enhanced system performance to meet the needs of the increasing size of the mammography data sets</li> </ul>
Integrated advanced visualization 3D tools within PACS workflow	Single workspace to address all clinical needs	<ul style="list-style-type: none"> <li>• Launch relevant clinical applications from a single workspace, increasing workflow and productivity</li> <li>• Reduce number of workstations and associated costs and resources needed to support, maintain, upgrade, route, and pre-fetch studies to disparate workstations</li> </ul>
Visible Light capture and management	Integral part of PACS platform	<ul style="list-style-type: none"> <li>• Intelligent clinical workflow provides a seamless user experience and a single repository to manage virtually all your medical images across the enterprise</li> <li>• Improve security/privacy of personal information (access control, audit trail, etc.)</li> <li>• Mobile, software-based solution grows with your enterprise and enables collaboration</li> <li>• Image-enable the EMR</li> </ul>
Radiation dose management	Integrated radiation dose data and reporting from DoseWise Portal to IntelliSpace PACS	<ul style="list-style-type: none"> <li>• Dose-related information is aggregated from multiple channels, including DICOM Radiation Dose Structured Reports, OCR on legacy dose sheets, Modality Performed Procedure Step (MPPS), or other image headers</li> <li>• IntelliSpace PACS users can easily analyze and interpret patient radiation dose per exam and overall cumulative exposure. <a href="#">DoseWise Portal sales toolkit on OneSource</a></li> </ul>

# Selling against Fuji

## IntelliSpace PACS: attack strategy – infrastructure (Target audience - CIO)

Features	Advantages	Benefits
Security	Secure hosting environment, secure software development, and secure application software	<ul style="list-style-type: none"><li>• Managed, secure hosting environment complying with National Institute of Standards and Technology (NIST) and US Department of Defense, Risk Management Framework (RMF) security and defense standards for security peace of mind</li><li>• Enhanced application level security, including authentication, session management, user-defined password management, access control at user and role levels, auditing, and data integrity checks</li><li>• An HIT partner you can trust to protect the confidentiality, integrity and availability of patient health information</li></ul>
IntelliSpace Universal Data Manager	We offer the clinical intelligence and workflow, scalability and performance of a traditional PACS along with the interoperability, standards-based environment, and universal image management of a VNA, all in a secure environment	<ul style="list-style-type: none"><li>• Scalable: Capable of managing huge volumes of data along with Clinical Image Lifecycle Management</li><li>• Interoperable: Open and standards-based, protecting existing and prospective investments</li><li>• Performant: Rapid retrieval; efficiently includes advanced clinical image lifecycle rules</li><li>• Universal: Integrated medical imaging record; managing ordered and non-ordered images</li><li>• Secure: Software secure by design, with disaster recovery in the cloud and data encryption in transit</li></ul>
Open platform for interoperability with third-party solutions	Easily interface with a broad range of EMRs and third-party and customer-developed solutions	<ul style="list-style-type: none"><li>• Choice of best of breed tools from Philips, third-party vendors, and homegrown</li><li>• Design and customize individual environments based on specific needs for improved efficiency and productivity</li></ul>



# Selling against Fuji

## IntelliSpace PACS: defend strategy 1 of 2

Fuji's claim	Additional details	Philips response
<p>Synapse 5</p> <p>Synapse 5 is a disruptive technology that sets a new standard for enterprise imaging. With focus on speed and interactivity, Synapse provides remarkable on-demand access to massive data sets and the ability to immediately interact with the data.</p> <p>Advances in efficiency and ergonomics facilitate productivity and a better overall user experience. The latest design includes:</p> <ul style="list-style-type: none"> <li>• Server-based image rendering</li> <li>• Zero-download viewer</li> <li>• Browser and operating system flexibility</li> <li>• Significant IT benefits</li> </ul> <p>Integrated diagnostic breast tomosynthesis and MPR/Fusion eliminate the need to go to a different workstation or launch a separate application to complete workflows.</p> <p>Synapse has been developed for and with our customers to positively impact patient care.</p>	<ul style="list-style-type: none"> <li>• Speed at the core <ul style="list-style-type: none"> <li>• Server-side image rendering leverages server power and superior bandwidth</li> <li>• Launches directly in the browser with no waiting for studies to cache</li> </ul> </li> <li>• Bandwidth-friendly <ul style="list-style-type: none"> <li>• Managing imaging from the server to the display – on demand and as needed, versus moving studies and caching them – results in significant reduction in network utilization and money saved for hospital IT organizations</li> </ul> </li> <li>• Tighter security <ul style="list-style-type: none"> <li>• Server-side design is fundamental to securing protected health information – no need to move the entire study to the desktop or mobile device</li> <li>• Eliminates client-side study cache (HIPAA-friendly)</li> </ul> </li> <li>• Comprehensive enterprise imaging <ul style="list-style-type: none"> <li>• Fujifilm is the only large imaging company with the MI portfolio and underlying architecture to serve as a single-vendor enterprise-imaging solution</li> <li>• Manages the needs of each department for DICOM and non-DICOM images; adaptive design – constructed or deconstructed</li> </ul> </li> <li>• Improved user efficiency <ul style="list-style-type: none"> <li>• On-demand image viewing and interaction saves time and streamlines workflow</li> <li>• Native MPR/Fusion and MG tomosynthesis - complete workflows on a single workstation</li> </ul> </li> <li>• Teleradiology (Philips Commentary) <ul style="list-style-type: none"> <li>• FujiFilm is highlighting Teleradiology (home reading) for the following reason; <ul style="list-style-type: none"> <li>• Server side rendering</li> <li>• High performance on low bandwidth connections</li> <li>• Zero footprint client, no download, secure PHI with no local image cache.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Philips IntelliSpace PACS leverages the patented iSyntax technology, providing just-in-time delivery of image data; this advanced technology delivers full fidelity and full-resolution medical images over existing hospital networks, making large infrastructure upgrades unnecessary</li> <li>• Philips iSyntax technology balances the workload across the entire network system – the server delivers just the required amount of data to utilize the client's image display, as is the user interrogates the image, the server delivers additional data, just-in-time, to match the user interaction with the image</li> <li>• From a security prospective, we deliver a secure hosting environment complying with National Institute of Standards and Technology (NIST) and US Department of Defense (RMF) security and defense standards; furthermore, we deliver enhanced application-level security, including authentication, session management, user-defined password management, access control at user and role levels, auditing, and data integrity checks</li> <li>• We deliver a comprehensive Enterprise imaging platform, complementing the EMR, and addressing the enterprise imaging needs of the institution, including Radiology, Cardiology, Mammography, Visible Light, and more. We offer the clinical intelligence and workflow, scalability, and performance of a traditional PACS, along with the interoperability, standards-based environment and universal image management of a VNA, all in a secure environment</li> <li>• Our Advanced Workflow solution is based on a fundamental understanding of radiology workflow, helping customers achieve their goal of high quality patient care, while also delivering advanced efficiency tools so that valuable time is spent solving diagnostics challenges, not navigating software. Our solution includes integrated 3D tools, mammography with tomosynthesis support, and a growing portfolio of tightly integrated applications that guide informed decisions with advanced clinical capabilities, providing relevant data and collaboration throughout the enterprise</li> <li>• Server-side rendering offers trade-off between centralized administration and scalability; as such, it is not a clear advantage</li> <li>• Teleradiology – IS/Radiology combined with UDM will provide improved low bandwidth performance with prefetching – typically, at home reading is replaced with Nighthawk type of service.</li> </ul>
<p>Fuji has authority to operate (ATO) in the DoD government segment</p>	<ul style="list-style-type: none"> <li>• Fujifilm is the first vendor with a networked medical system to attain a Risk Management Framework (RFM)-based ATO</li> <li>• Click here for more details: <a href="#">Fujifilm's Synapse PACS is first system granted authority to operate under new U.S. DOD process</a></li> </ul>	<ul style="list-style-type: none"> <li>• Philips has made significant investment to enhance the security of our offering and become RMF-compliant – we now meet the US government Risk Management Framework requirements</li> <li>• While we do not yet at ATO in the DoD segment we are actively working on securing an implementation site</li> <li>• Our ability to meet RMF and our managed service offering should also be positioned as a positive in the commercial market even beyond the government segment</li> </ul>

# Selling against Fuji

## IntelliSpace PACS: defend strategy 2 of 2

Fuji's claim	Additional details	Philips response
<p>Synapse VNA</p> <p>Synapse VNA (vendor neutral archive) was designed for true imaging interoperability. It provides secure, easy-to-manage storage and access to the complete patient imaging record and links all HIT systems.</p>	<p>Synapse VNA was designed for true imaging interoperability. It provides secure, easy-to-manage storage and access to the complete patient imaging record and links all HIT systems.</p> <ul style="list-style-type: none"><li>Secure and enable control of all image data with Image Life Cycle Management tools</li><li>Create a single, patient-centric view across the entire continuum of care</li><li>Manage all DICOM and non-DICOM enterprise clinical imaging content in the single most scalable storage solution available</li><li>Connect imaging content across all enterprise imaging using VNA-inherent workflow</li><li>Integrate all your imaging systems; Synapse VNA has connected more third-party systems than any other VNA</li></ul>	<ul style="list-style-type: none"><li>Synapse VNA is similar to our Universal Data Management offering<ul style="list-style-type: none"><li>Scalable: Capable of managing huge volumes of data with Clinical Image Lifecycle Management</li><li>Interoperable: Open and standards-based, protecting existing and prospective investments</li><li>Performant: Rapid retrieval; efficiently includes advanced clinical image lifecycle rules</li><li>Universal: Integrated medical imaging record; managing ordered and non-ordered images</li><li>Secure: Software – secure by design, with disaster recovery in the cloud and data encryption in transit</li></ul></li><li>While Synapse VNA is similar, Fuji does not have the complete enterprise imaging story that we do. We both tout the ability to manage DICOM and non-DICOM images, but Fuji lacks options for managing non-DICOM imaging workflow...arguably the most complex part of the enterprise imaging strategy. Included as part of our service delivery model, the Visible Light Capture application, provides a seamless user experience for managing non-ordered images which end up in our universal data management system</li><li>For PACS customers who want both scalability and performance, while also achieving interoperability and universal image and data management, UDM offers a no-compromise solution to managing and storing a wide array of patient images and data in a standards-based environment – unlike traditional VNAs, there is no expensive migration or loss of performance; customers can access images in a matter of seconds while also achieving scalability and interoperability for all images and related data in a secure system with high performance metrics</li><li>No compromise<ul style="list-style-type: none"><li>High performance</li><li>Manage non-ordered images with visible light (included in managed service)</li><li>Standards-based interoperability</li><li>Scalable data management</li></ul></li></ul>
<p>Synapse Mobility Enterprise Viewer</p> <p>Feature rich DICOM and non-DICOM image and report viewer that seamlessly supports and integrates with Synapse VNA</p>	<p>Zero footprint client</p> <ul style="list-style-type: none"><li>No client-side study cache</li><li>HIPAA-friendly</li><li>No image download for display</li><li>Optimizes bandwidth with zero-download embedded viewer</li></ul>	<ul style="list-style-type: none"><li>Philips IntelliSpace PACS has built its brand on enterprise distribution of images and we continue to innovate around the needs of the market. Philips IntelliSpace PACS Anywhere provides a zero-footprint, independent platform for securely transferring and viewing image data across different devices. Designed for web-viewing and mobile devices, manipulating standard DICOM images, as well as visible light images, is naturally intuitive.</li><li>IntelliSpace PACS Anywhere goes beyond image review to expand level of enterprise communication and collaboration. Caregivers across the organization can access images and diagnostic reports from their PC or mobile device when and where it's needed. Embedded communication capabilities foster collaboration and insight between technologists, radiologists, and clinicians, while mobility and workflow advancements help support patient interactions and decision-making on the go.</li></ul>

# Selling against Fuji

KLAS insights: PACS category

## Providers waiting for the “wow” from Fujifilm and Phillips

Fujifilm and Phillips have met providers’ needs for years with stable, easy-to-use PACS solutions, and both are still broadly considered.

However, customers have been left wishing for more innovation, citing frustrations around promised but undelivered functionality. The vendors’ plans for enterprise imaging may change this.

Fujifilm acquired TeraMedica a few years ago for their VNA, though providers still view the VNA solution as being independent from the PACS.

Phillips is developing an enterprise imaging platform from the ground up but has been somewhat late to the game.

Source: KLAS Report: PACS 2017 Reconstructing for the future

## Large Hospital Customer Retention and Loyalty (>200 Beds)

[NP] Not Primary  
† Legacy Product

■ Planning to Leave ■ Considering Leaving  
■ Stuck—Would Leave if They Could



## Detailed Breakdown of PACS Overall Scores

■ 85.0–100.0 ■ 80.0–84.9 ■ 70.0–79.9 ■ <70.0 ■ Limited Data

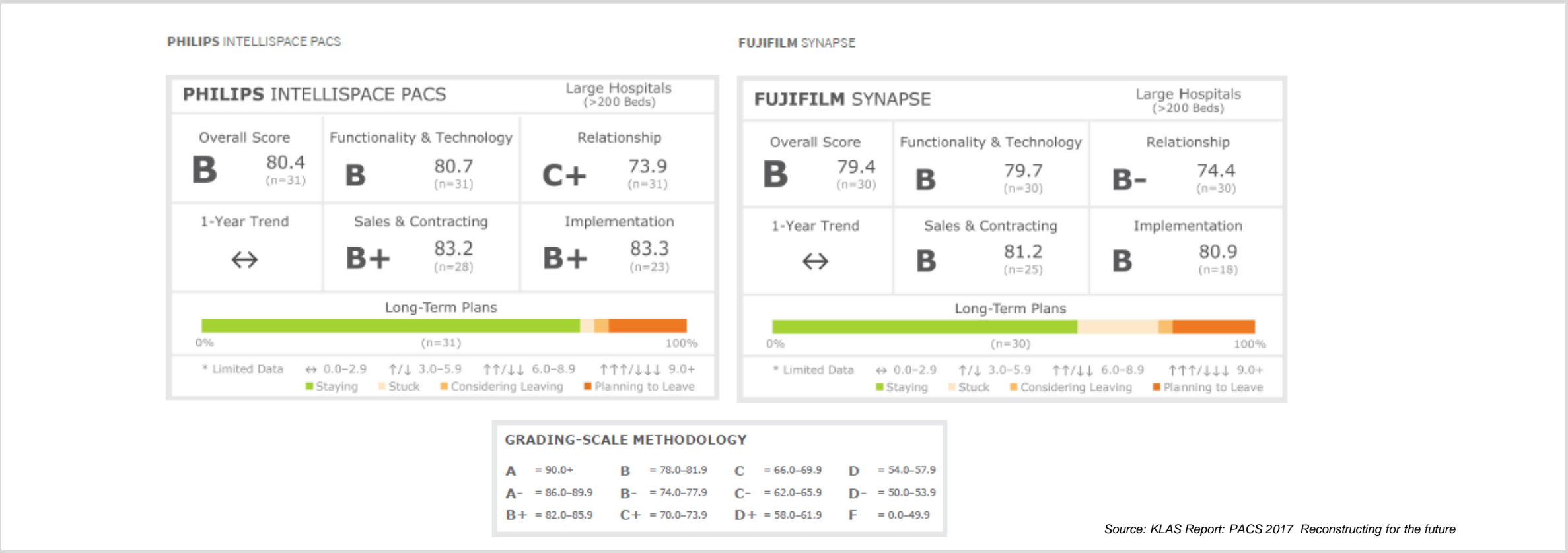


When competing, it is important to promote our new “wows” – our advancements such as UDM, Analytics, Illumeo, VL, advanced mammography, and RWS. From what we can tell, Synapse 5 cannot match what we offer.

Also, we have a distinct advantage in larger institutions.

# Selling against Fuji

KLAS insights: PACS category



From a KLAS ranking standpoint, there does not appear to be areas where Fuji can attack us. Our rankings are fairly close.



# Selling against Fuji

## **Cardiology informatics**

# Selling against Fuji

## IntelliSpace Cardiovascular: attack strategy

Features	Advantages	Benefits
Cardiology timeline	Make informed decisions with a comprehensive overview of your patient. Minimizes time involved in accessing studies in additional systems and potential for costly retesting	<ul style="list-style-type: none"> <li>• Delivers a graphical, panoramic, chronological overview of your patients' cardiovascular care continuum to help you enhance the quality of cardiac care</li> <li>• The Cardiology Timeline also serves as a launch pad to detailed clinical records</li> <li>• Provides clinicians with easy access to prior cardiovascular exams to help reduce unnecessary and costly retesting</li> </ul>
Multi-modality workspace	Provides a single cardiology workspace with immediate access to all relevant cardiovascular information	<ul style="list-style-type: none"> <li>• Organize day with user-centric layer by creating a customized worklist to filter information needed</li> <li>• Access graphical study list within search and worklist applets</li> <li>• Access patient information from a single workspace</li> <li>• Complement your EMR</li> <li>• Work with medical devices from a variety of vendors</li> <li>• Zero-footprint technology; accessible anytime, virtually anywhere</li> <li>• Compare multi-modality images and/or documents side by side</li> <li>• Launch directly into third-party applications for more information</li> </ul>
Zero footprint workspace with web-based echo reporting accessible anytime, virtually anywhere	Access full diagnostic quality images via the web	<ul style="list-style-type: none"> <li>• Web-based echo reporting, virtually anytime</li> <li>• Fulfills the need to analyze echo images and create and finalize echo reports remotely</li> <li>• Provides diagnostic-quality echo images, including the ability to perform measurements and calculations</li> <li>• Generates a report using user configurable templates</li> <li>• Zero Footprint reduces client deployment needs and costs and can allow access to application from anywhere</li> </ul>
EMR integration	Launch from EMR into IntelliSpace Cardiovascular/Xcelera and from Intellispace Cardiovascular into EMR	<ul style="list-style-type: none"> <li>• Vendor agnostic towards EMRs</li> <li>• Launch directly from your EMR into IntelliSpace Cardiovascular</li> <li>• Procedure/patient context – images and documents are automatically selected and displayed in the Image and Document Viewer applets</li> <li>• Use the EMR/HIS interface to access IntelliSpace Cardiovascular while working in your EMR/HIS system</li> </ul>

# Selling against Fuji

## IntelliSpace Cardiovascular: attack strategy

Features	Advantages	Benefits
Epic Cupid integration	Facilitates reporting via Epic Cupid. Allows image analysis and measurements from Intellispace Cardiovascular to be sent to Epic Cupid for inclusion in the report	<ul style="list-style-type: none"> <li>Enables context synchronization for the user, patient, and study, and near-real-time transfer of measurements and calculation of results created in IntelliSpace Cardiovascular to the Epic Cupid application</li> <li>Helps to decrease error by eliminating manual input of measurements and calculation results into Epic</li> </ul>
Expanded Web API	Launch into third-party applications from the ISCV workspace	<ul style="list-style-type: none"> <li>Through third-party applications, customers have the flexibility to launch into third-party applications via a Uniform Resource Locator (URL) at system, patient, study, and series level</li> <li>Multiple URLs per modality provide flexibility to use multiple applications for one modality</li> <li>Easy access to third-party applications not in patient or study context</li> <li>Easy access to other applications such as Advanced Analytics, your scheduling system, or your ECG worklist</li> <li>Streamline workflow by having access to multiple third-party applications in patient context, such as hospitals which use more than one EMR</li> </ul>
Advanced analytics	Advanced Analytics tool helps dig deeply into data from various clinical and administrative systems	<ul style="list-style-type: none"> <li>Examine data across your patient population for trending purposes; quickly identify trends to support improvement of hospital workflows; uncover opportunities for enhancing procedural efficiency</li> <li>Use report templates for common reports</li> <li>Drill down further into individual patient data across patient population</li> <li>Access supply utilization and productivity and outcomes reporting</li> <li>Use a single industry-standard Microsoft reporting service tool to access data stored by IntelliSpace cardiovascular applications</li> <li>Access via internet explorer or via the Web API</li> <li>Distribute scheduled reports automatically</li> </ul>
Diagnostic guidance	Supports reporting confidence and accuracy	<ul style="list-style-type: none"> <li>Operates during reporting to warn of conflicts, errors, omissions, or patterns that would otherwise go unreported or mistakenly reported</li> <li>Retrospective analysis to determine how often a given rule set is violated, which is useful in auditing situations as we establish best practices</li> <li>Creates comprehensive reports that aid in confident and efficient decision-making when developing treatment plans</li> <li>Helps you meet reporting standards and accreditation requirements the first time with confidence</li> </ul>

# Selling against Fuji.

## XPER IM/Flex: attack strategy

**Important to remember Fuji does not offer a Hemo solution**

Features	Advantages	Benefits
Clinical decision support	Empower caregivers in the cardiac cath lab area to make fast, informed clinical decisions wherever care is delivered	<ul style="list-style-type: none"> <li>Advanced clinical decision support <ul style="list-style-type: none"> <li>FFR, ETCO2</li> </ul> </li> <li>Supports patient care pre-procedure, during the procedure, and in recovery <ul style="list-style-type: none"> <li>Xper Bedsides, Xper IM interface with PIIC iX IntelliVue; Xper IM interface with Epic Cupid</li> </ul> </li> <li>Support quality and accreditation initiatives <ul style="list-style-type: none"> <li>NCDR Cath PCI charting menus, dedicated CathPCI template, clinical discreet data interface</li> </ul> </li> <li>Meet internal and external compliance objectives <ul style="list-style-type: none"> <li>Q &amp; A reporting with data analysis module</li> </ul> </li> </ul>
Streamline clinical workflows	Orchestrate and facilitate collaboration across specialty teams with rich panoramic patient impressions	<ul style="list-style-type: none"> <li>Ease of use and customizable to both clinical and operation needs <ul style="list-style-type: none"> <li>Customized charting menus, custom forms, physician report templates</li> <li>Cath lab inventory management, cath lab data analysis</li> </ul> </li> <li>Provides multi-facility support through unified access, data/information and performance through an enterprise <ul style="list-style-type: none"> <li>Single stand-alone, multi-facility enterprise; single or multiple database repositories</li> <li>IntelliBridge Enterprise</li> </ul> </li> <li>Proactive support to reduce downtime</li> </ul>
Maximize return on healthcare IT investment	Drive provider reimbursement with clinical and economic outcomes and comply with standards of care and the consumerization of the cath lab area	<ul style="list-style-type: none"> <li>Increased ROI through understanding operational efficiencies <ul style="list-style-type: none"> <li>Xper Inventory module with bi-directional interface</li> <li>Xper Cath Lab Data Analysis module</li> <li>Xper Billing &amp; Coding module supports billing workflow through management and association of ICD 10 and CPT codes</li> </ul> </li> <li>Provides the most scalability with the least amount of incremental costs (# of labs, users, etc.) <ul style="list-style-type: none"> <li>Xper concurrent licenses, Xper Data Center</li> </ul> </li> <li>Complies with industry standards and provides adaptive architecture that deploys in enterprise infrastructures <ul style="list-style-type: none"> <li>Xper Data Center, Windows 10, Windows Server 2014, SQL 2012</li> <li>Xper Connect w/ &gt;900 live interfaces</li> </ul> </li> </ul>



# Selling against Fuji

## Cardiology informatics – defend strategy (1 of 2)

Fuji's claim	Additional details	Philips response
Secure, true, thin client	Web-based <u>virtualization</u> capabilities using both <u>VMWare</u> and <u>Citrix</u> facilitate anytime, anywhere, secure access to Synapse Cardiovascular	<ul style="list-style-type: none"> <li>• We believe that IntelliSpace Cardiovascular offers a true zero-footprint that does not require deployment of other technologies to utilize (i.e., VMWare, Citrix, etc.) is a key</li> <li>• With IntelliSpace Cardiovascular's zero footprint workspace, we provide secure access via a web browser using TLS security and enable access from virtually anywhere with no client side installation (reverse proxy or VPN)</li> <li>• The zero-footprint workspace allows access to view all images, reports, and documentation stored within the solution as well as easily launch into configurable third-party web application in patient or study context</li> <li>• For Echo studies the Zero Footprint environment features the ability to make measurements and annotations and create, edit, and finalize a report</li> </ul>
Full integration	As a single source for comprehensive diagnostic and reporting capabilities for clinical professionals in a variety of cardiac specialties, including <u>nuclear cardiology</u> , <u>vascular ultrasound</u> , <u>echocardiography</u> , <u>ECG management</u> and <u>cardiac catheterization</u> , Synapse Cardiovascular streamlines workflows and optimizes the efficiency of your facility	<ul style="list-style-type: none"> <li>• IntelliSpace Cardiovascular, with access to advanced clinical applications, brings multi-modality images and clinical tools together in a single customizable workspace; the Cardiology Timeline presents a patient's complete cardiovascular history graphically, providing easy access to quickly view and compare studies as well as launch advanced applications</li> <li>• IntelliSpace Cardiovascular offers advanced visualization and quantification with embedded tools and/or direct integration <ul style="list-style-type: none"> <li>• Cardiovascular X-ray – LVA, QCA, QVA, and vascular processing</li> <li>• Echocardiography – Philips QLAB and/or TomTec</li> <li>• Nuclear cardiology – AutoQuant Plug-in and/or IntelliSpace Portal</li> <li>• Beyond the standard imaging modalities IntelliSpace Cardiovascular can acquire documentation/reports from sub-speciality systems and store as PDF for a more complete view into a patients cardiovascular history from a single system</li> </ul> </li> <li>• IntelliSpace Cardiovascular can be tightly integrated to third-party systems via its web and third-party API capabilities - such as Medstreaming and GE MUSE</li> <li>• Fuji uses Epiphany for ECG management – IntelliSpace Cardiovascular integrates with Philips IntelliSpace ECG and/or GE Muse</li> <li>• Critical to position them as a niche vendor that is reliant on partnerships</li> </ul>

# Selling against Fuji

## IntelliSpace Cardiovascular: defend strategy (2 of 2)

Fuji's claim	Additional details	Philips response
A scalable multiple modalities solution	<p>A multi-modality solution, the same system supports all cardiology departments</p> <ul style="list-style-type: none"> <li>• Hospital and CV enterprise capable</li> <li>• Available as software-only or as a turnkey system</li> <li>• Integrates with existing EMR, HIS, and dictation systems</li> <li>• <u>VMware virtualization</u> helps facilities reduce expenses through consolidation of servers, automation, and reduction of planned and unplanned down time</li> </ul>	<ul style="list-style-type: none"> <li>• Our IntelliSpace Cardiovascular is highly scalable and can be offered to support one modality and a few users at a clinic to support multi-site, multi-modality enterprise deployments</li> <li>• Important to remember IntelliSpace Cardiovascular is easily expanded to grow as needed by expanding the supported users to adding additional features, options, and clinical tools; offers site license option for access by an unlimited number of users</li> <li>• Integrates with the EMR as well as can complement the EMR. EMR Context launch allows user to launch directly into Intellispace Cardiovascular in patient or Study Context to easily view images and documentation and access advanced toolsets</li> <li>• Offered as a software-only solution or as a turnkey system with hardware. Facilities can elect to provide their own hardware and/or deploy within a VMWare-based infrastructure</li> </ul>
A complete solution for every specialty	<p>Synapse Cardiovascular offers advanced features and exceptional images to accelerate workflow and enhance diagnostic confidence. With fully customizable structured reports and hundreds of advanced measurement functions, Synapse Cardiovascular meets the unique needs of cardiologists in a variety of specialties</p> <ul style="list-style-type: none"> <li>• Echo cardiology</li> <li>• Cardiac cath</li> <li>• Nuclear cardiology</li> <li>• Vascular ultrasound</li> <li>• ECG management</li> </ul>	<ul style="list-style-type: none"> <li>• IntelliSpace Cardiovascular integrates directly with Xper IM, our complete interventional management, monitoring, charting and reporting solution. <b>Fuji does not offer a hemo system and is reliant on integrating with third-party systems</b></li> <li>• Philips offers integration with its IntelliSpace ECG management system as well as integration with third-party ECG Management systems such as GE Muse. <b>Fuji does not have an ECG management system and partners with Epiphany</b></li> <li>• IntelliSpace Cardiovascular offers highly customizable structured reporting and measurement capabilities</li> <li>• DICOM SR is supported by virtually all Echo systems utilizing the DICOM mapping tool</li> <li>• In addition to highly customizable reports, IntelliSpace Cardiovascular offers diagnostic guidance for echo reporting. Diagnostic Guidance improves the quality and completeness of reporting and minimizes the potential for errors by alerting the user to critical errors and missing information prior to finalizing</li> </ul>

# Selling against Fuji

## IECG: attack strategy

Features	Advantages	Benefits
ECG Anywhere web-based client	Zero-footprint solution allowing cardiologists to access multiple IECG systems, facilities	<ul style="list-style-type: none"> <li>• We provide secure access to ECG information from anywhere on different devices</li> <li>• Web client-compatible with HTML5 browsers – nearly universal access from wide range of common devices and viewers is a key point to make</li> <li>• We have ability to review, edit, and confirm from remote viewers, including non-Philips ECGs</li> <li>• We can link multiple IECG systems, facilities, and all locations from a single web-client</li> <li>• Enables both analysis and serial comparison functions to utilize powerful IECG</li> <li>• We can un-confirm, analyze, and run serial comparisons</li> </ul>
DXL algorithm	Provides precise and consistent ECG measurements to generate interpretive statements	<ul style="list-style-type: none"> <li>• Filtering to identify critical data</li> <li>• Determines discrete measurements</li> <li>• Compliance with ACC/AHA/HRS guidelines (STEMI, NSTEMI, Pacemakers)</li> </ul>
Statement editing	Frequently used statements are easily accessible by individual users	<ul style="list-style-type: none"> <li>• Provides flexibility to choose desired methods for search and inserting diagnostic statements</li> <li>• Fully configurable and customizable statements by disease category</li> <li>• IECG automatically tracks usage history and provides a list of the last 20 statements inserted for easy and quick access</li> <li>• Support for billing codes</li> </ul>
Multi-level over-reading workflow	Supports two roles in over-reading workflow to provide training tool for cardiology fellows in teaching institutions while lightening the reading task for cardiologists	<ul style="list-style-type: none"> <li>• Supports two roles in Approve/Confirm over-reading workflow</li> <li>• Provides training tool for cardiology fellows while lightening the reading task for cardiologists</li> <li>• Accelerates workflow and improves clinical outcomes where ER doctors read and interpret complex ECGs and cardiologists review and confirm initial interpretation</li> </ul>

# Selling against Fuji

## IECG: attack strategy

Features	Advantages	Benefits
Full integration of IECG and Philips ST80i stress systems	Centrally store Philips stress report and study data, provide ability to edit stress report, and integrate custom workflow	<ul style="list-style-type: none"><li>• IECG is fully integrated with Philips ST80i stress system and centrally stores stress reports and study data, enabling a transition to digital workflow</li><li>• Single point-of-entry to increase efficiency and improve patient outcomes with all patient studies and procedure data</li><li>• Ability to edit the stress PDF report in IECG</li></ul>
IECG cover page process	Allow reviewing cardiologists to edit preliminary diagnostic information in Holter and ST80i PDF reports including “Narrative Summary” and “Interpretation”	<ul style="list-style-type: none"><li>• Provides a configurable list of commonly used diagnostic phrases that can easily be included in the cover page</li><li>• Read the “Narrative Summary” and “Interpretation” from meta data in Holter or Stress PDF reports and fill in the PDFcover page automatically when the report is opened</li></ul>
Connectivity	Flexible infrastructure requirements to ease deployment in your IT environment	<ul style="list-style-type: none"><li>• Supports industry standard interfacing via HL7, DICOM, and IHE</li><li>• Two-way data exchange between IntelliSpace ECG and clinical and administrative systems</li><li>• Interfaces with both Philips and non-Philips diagnostic ECG applications</li></ul>



# Selling against Fuji

## IECG: defend strategy

Fuji's claim	Additional details	Philips response
Epiphany is integrated with 150 devices from 50 vendors in 15 diagnostic modalities in a vendor-neutral archive	Multi-modality/Multi-Vendor report: review, edit, confirmation and printing No special application required; all that is needed is your standard web browser View ECGs from virtually anywhere on iPhone, iPad, or Android devices Simple on-line reading; one-click confirmations with Intelligent Serial Comparison Administrative functions performed remotely or locally	<ul style="list-style-type: none"> <li>Philips provides the flexibility to implement the interface that is most beneficial to workflow</li> <li>Fuji leverages Epiphany, a small independent company, in order to match Philips suite of cardiology solutions</li> </ul>
Intuitive user-interface	Physician training on Cardio Server can be accomplished in about 15 minutes Different interpretation methods to appeal to different physician preferences All interpretation methods may be customized per physician, per modality Cardio Server recognizes each user at log-in and posts his/her favorites automatically	<ul style="list-style-type: none"> <li>Philips provides comprehensive training for technicians, super users and clinicians; training can be delivered onsite or online</li> <li>Training is tailored to physician's workflow preference</li> </ul>
Hardware-independent application that runs on your server technology on your network in your domain	<ul style="list-style-type: none"> <li>Currently integrated with all major EMRs including Epic, Meditech, Siemens, Cerner, McKesson, Allscripts, NextGen and more</li> <li>Epiphany supports VMware and other virtual server environments</li> <li>Epiphany supports Modality Worklists</li> <li>Use your preferred tools for back-up, disaster recovery, service packs, updates and anti-virus programs</li> <li>Cost-effective EMR Integrations: Purchase ONE interface for all modalities and consolidate multiple device interfaces into one integration</li> <li>Use existing Active Directory/LDAP for access to Cardio Server</li> <li>Comprehensive HIPAA logging for actions and changes in interpretations</li> </ul>	<ul style="list-style-type: none"> <li>Philips delivers current and previous ECGs right at the point of decision including: <ul style="list-style-type: none"> <li>PageWriter cardiographs</li> <li>IntelliVue monitors</li> <li>IntelliSpace Cardiovascular</li> <li>Smartphones</li> </ul> </li> <li>The ECG Anywhere client is compatible with HTML 5 web browsers and mobile devices for access to patient information, waveforms, and diagnostic reports</li> <li>The Philips user interface adapts to both keyboard/mouse and touchscreen gesture controls</li> </ul>

# Selling against Fuji

KLAS insights: Cardiology informatics

## STRUCTURED REPORTING BY AREA

Represents feedback only from providers using the vendor in 2+ structured reporting modules  
\*Limited Data

	<div>75% +50-74%25-49%&lt;25%</div>					
	Echo	Cath	Vascular	EP	Nuclear	Pediatric Echo
	Adoption	Adoption	Adoption	Adoption	Adoption	Adoption
Fujifilm (n=15)	100%	20%	60%	7%	40%	27%
LUMEDX (n=15)	47%	80%	53%	60%	20%	20%
McKesson (n=21)	86%	86%	57%	43%	33%	29%
Merge, an IBM Company (n=20)	100%	70%	60%	30%	40%	30%
Philips (n=19)	100%	58%	42%	5%	32%	63%
Siemens (n=19)	79%	42%	37%	21%	21%	42%

Fuji has much less adoption in Hemo/Cath

## % PLANNING TO USE THE VENDOR GOING FORWARD

\*Limited Data



More customers planning for Philips vs. Fuji

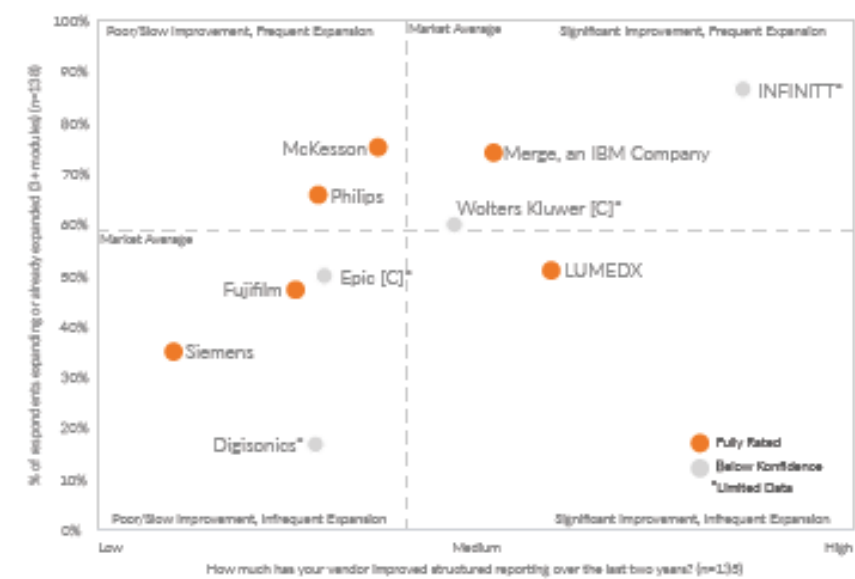
Source: KLAS Cardiology 2016 Report, October 2016

***“Providers using Fuji (Cardiology) are disappointed with lack of workflow improvement and are often dropping structured reporting even if they retain, at least for now, Fuji’s cardiology PACS.”***

# Selling against Fuji

KLAS insights: Cardiology informatics

EXPANSION VS. STRUCTURED REPORTING IMPROVEMENT



- Fuji and Digisonics are expanding infrequently - clients reporting only limited improvement
- Providers report Siemens and Fuji are receptive to their feedback but do not see improvements to customizability, automation, or workflow to improve clinician experience

The data in this report comes from both evaluation types and was collected over the last 12 months; the number of unique responding organizations for each is given in the chart below.

	Standard Evaluations	Supplemental Evaluations	Estimated Market Penetration
Fully Rated Vendors			
Fujifilm	37	15	Medium
LUMEDX	26	15	Medium
McKesson	32	21	Deep
Merge, an IBM Company	36	20	Deep
Philips	44	19	Deep
Siemens	40	19	Deep
Vendors Below Confidence			
Digisonics	22	6	Shallow
Epic	17	10	Shallow
INFINITT	7	7	Shallow
Wolters Kluwer	13	10	Shallow
Other Cardiology Vendors			
Agfa HealthCare	--	<6	--
GE Healthcare	--	--	--
Sclmage	--	<6	--

Fuji has “Medium” cardiology market penetration vs Philips Deep penetration.

Source: KLAS Cardiology 2016 Report, October 2016

“Providers expressed significant interest in the future of Philips IntelliSpace Cardiovascular.”

# Selling against Fuji

KLAS insights: Cardiology informatics

Overall KLAS Score:  
 Philips 77.5  
 Fuji 73.7

Category	Ranking	Insight
Sales and contracting: Philips stronger than Fuji Fuji is stronger in the “Avoids charging for everything” category	Avoids charging for everything: <b>PHILIPS</b> = 77% vs <b>FUJIFILM</b> = 83% Sales and contracting category: <b>PHILIPS</b> = 79.0 vs <b>FUJIFILM</b> = 75.3	<ul style="list-style-type: none"> <li>Philips provides a wide range of custom configurations and services solutions to address both current and future customer requirements</li> <li>Philips offers customers product structures that allow us to tailor the solution to customer needs helping avoid investments in functionality that does not have a meaningful impact to their daily</li> </ul>
Implementation and training: Philips stronger than Fuji	<b>PHILIPS</b> = 83.3 vs <b>FUJIFILM</b> = 70.5	<ul style="list-style-type: none"> <li>Philips dedication to its customers is expressed through the investment made to the training and implementation programs that lead this category leaving customers with a positive experience</li> </ul>
Functionality and upgrades: Philips & Fuji equal ranking	<b>PHILIPS</b> = 78.6 vs <b>FUJIFILM</b> = 78.6	<ul style="list-style-type: none"> <li>Philips and Fuji have similar customers feedback in this category. Customers equally enjoy the flexibility of the solutions and are excited for future functionality in the latest versions of both solutions</li> </ul>
Service and support: Philips stronger than Fuji in both categories	Quality of support <b>PHILIPS</b> = 75.5 vs <b>FUJIFILM</b> = 71.2 Keeps all promises: <b>PHILIPS</b> = 79% vs <b>FUJIFILM</b> = 65%	<ul style="list-style-type: none"> <li>Philips makes every effort to proactively address customers issues, however a continued theme with customer feedback is that we need to focus more in this area</li> </ul>
General: Philips stronger than Fuji	<b>PHILIPS</b> = 78.5 vs <b>FUJIFILM</b> = 74.2	<ul style="list-style-type: none"> <li>Philips has a strong reputation for investing in innovation and internal resources that result in more satisfied customers and greater adoption than Fuji in this category</li> </ul>

Source: snapshot report from KLAS website, July 28, 2017

# Selling against Fuji

## **Advanced visualization**

# Selling against Fuji

## IntelliSpace Portal: attack strategy

Features	Advantages	Benefits
Single Advanced Visualization platform, spanning clinical domains and modalities	Connecting imaging	<ul style="list-style-type: none"> <li>• Multi-modality AV server solution eliminates the need for multiple modality-specific workstations</li> <li>• Can be launched from any PACS system</li> <li>• Client/server architecture allows access from anywhere in the network, even over VPN</li> <li>• Ability to connect to multiple scanners, even from other vendors</li> <li>• Task-guidance workflow and powerful “zero-click” preprocessing and automated pre-fetch capabilities for ease of use and throughput</li> <li>• Collaborative tools to help build stronger professional relationships, especially with general surgeons, emergency physicians, oncologists, cardiologist’s and other referring physicians</li> <li>• Tight integration with IntelliSpace Cardiovascular for more streamlined reading</li> </ul>
	Provides an integrated workflow to empower clinicians, helping reduce variability and increase diagnostic confidence	<ul style="list-style-type: none"> <li>• Comprehensive set of clinical applications (+70) supporting diagnosis and clinical workflow in cardiology, neurology, oncology, vascular, and surgery</li> <li>• ISP provides solutions for the most difficult cases</li> <li>• Auto-segmentation and measurement tools to improve precision and consistency</li> <li>• 3D viewing tools and automatic segmentations and key image management allow for easy analysis and reporting</li> <li>• Deliver the latest clinical tools and enhancements with annual heartbeat</li> <li>• KnowledgeScape real-time learning tool</li> <li>• 3D printing capabilities to be able to personalize pre-surgical planning</li> <li>• Machine learning capabilities: ISP automatically adjusts pre-processing rules to physician patterns</li> <li>• Fast image transfer, removal of non-target anatomy, user-configurable layouts help minimize diagnostic variance and reduce time to results, with up to 77% time savings in some cases</li> </ul>
	Offers a unified, scalable enterprise-wide solution	<ul style="list-style-type: none"> <li>• Ability to scale up to 100 users and connect multiple hospitals</li> <li>• Scalability with resource-based licensing</li> <li>• Centralized management tools</li> <li>• Remote monitoring tools and services solutions to keep the solution running at optimal performance</li> <li>• Compliance with the latest data security and privacy demands without compromising accessibility</li> <li>• Flexible IT solutions such as ability to regularly update antivirus and Microsoft OS patches, to remotely deploy clients via SMS push, and to define access levels for various user groups</li> </ul>



# Selling against Fuji

## IntelliSpace Portal: defend strategy

Fuji's claim	Additional details	Philips response
PACS driven workflow	Optimize workflow with Synapse 3D's advanced diagnostic tools for radiology	<ul style="list-style-type: none"><li>• Synapse 3D has not been sold as a standalone AV solution or as a PACS agnostic solution</li><li>• Lack of support in the field, not enough resources</li><li>• Still very new arena for Fuji; not ranked by KLAS or very visible marketing</li></ul>
3D hanging protocols	Synapse 3D is fully integrated with Synapse PACS and Synapse Cardiovascular, with one-click access and a consistent user interface	<ul style="list-style-type: none"><li>• Position Philips integration of IntelliSpace Portal with IntelliSpace PACS and IntelliSpace Cardiovascular</li><li>• We can also integrate seamlessly with non-Philips PACS customers via API integration</li><li>• Also, Fuji offers 40 applications vs. our larger set of applications</li><li>• Limits usage to eight users per server (source: ITNonline.com comparison chart)</li><li>• They do not have the unique integration for modalities like we do for Philips ex: iXR, US, CT iQon, etc.)</li></ul>
One single database	Access from any Synapse client with Fujifilm's fast, secure proprietary communication protocol	<ul style="list-style-type: none"><li>• Not a true comprehensive AV solution (client's likely not able to standardize on one platform)</li><li>• Lack of Cardiology suite</li><li>• We offer more apps and even third-party apps</li></ul>
Zero-footprint client	<ul style="list-style-type: none"><li>• Zero foot print client, web-based software</li><li>• Fuji offers a good Enterprise HIT configuration</li><li>• Fast processing</li><li>• Single sign-on for Cardiology and Radiology Synapse PACS</li><li>• They can create shortcuts for the keypad</li><li>• They can create custom toolbars</li></ul>	<ul style="list-style-type: none"><li>• Philips offers more concurrent users for a true enterprise-wide solution</li><li>• We integrate seamlessly with non-IntelliSpace PACS customers via API integration</li><li>• We have an upgrade path for existing install base, they do not</li></ul>

# Selling against Fuji

KLAS insights – Advanced Visualization category

Fuji not present in KLAS rankings  
Position as a niche PACS/image management vendor

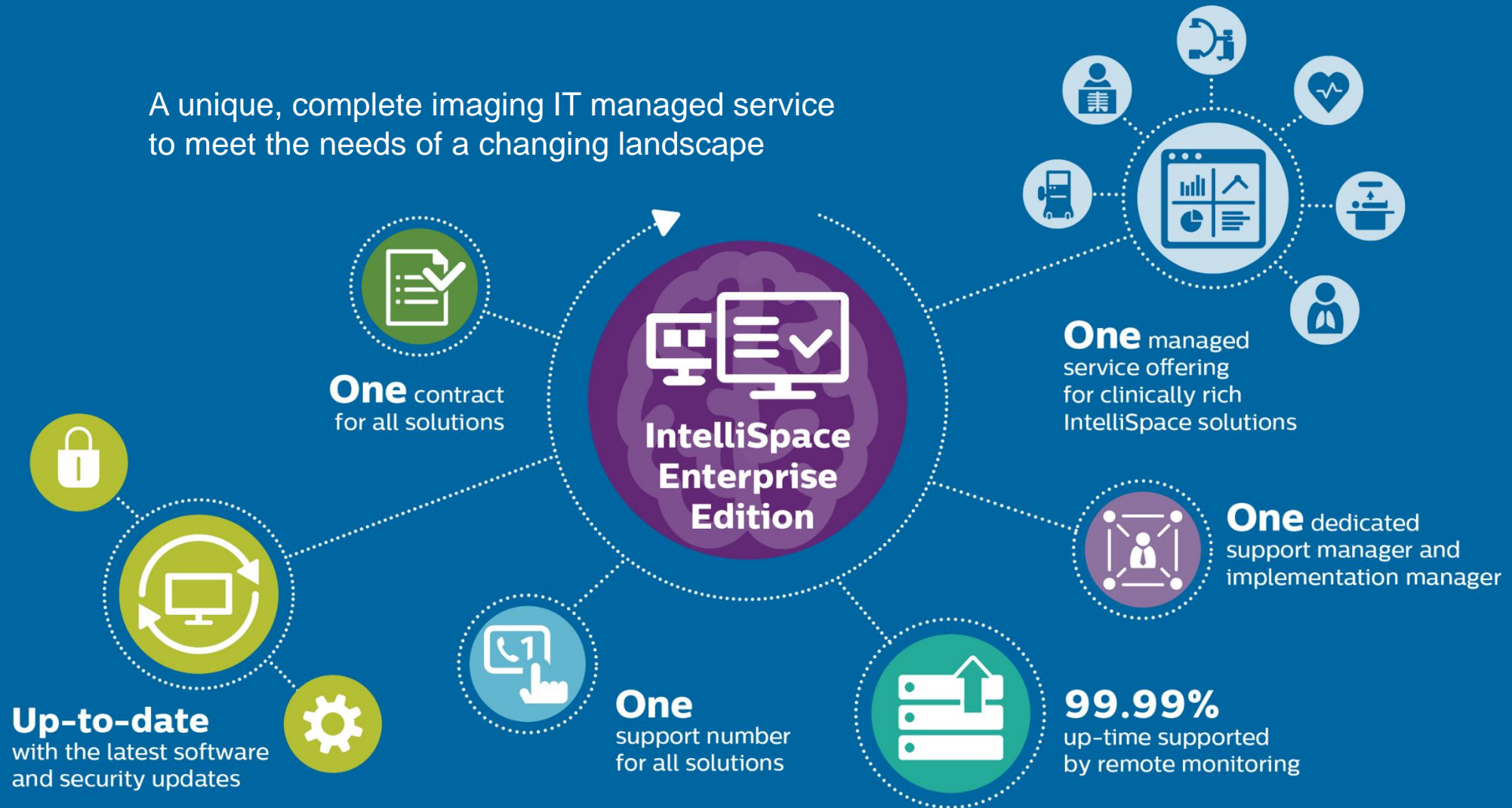


Category	Ranking	Insight
	Fuji is not KLAS ranked for Advanced Visualization	As Fuji is new to AV and its applications are offered only as part of their PACS, they are not considered by KLAS to be an AV provider.

Selling against Fuji  
**IntelliSpace Enterprise Edition**

# IntelliSpace Enterprise Edition

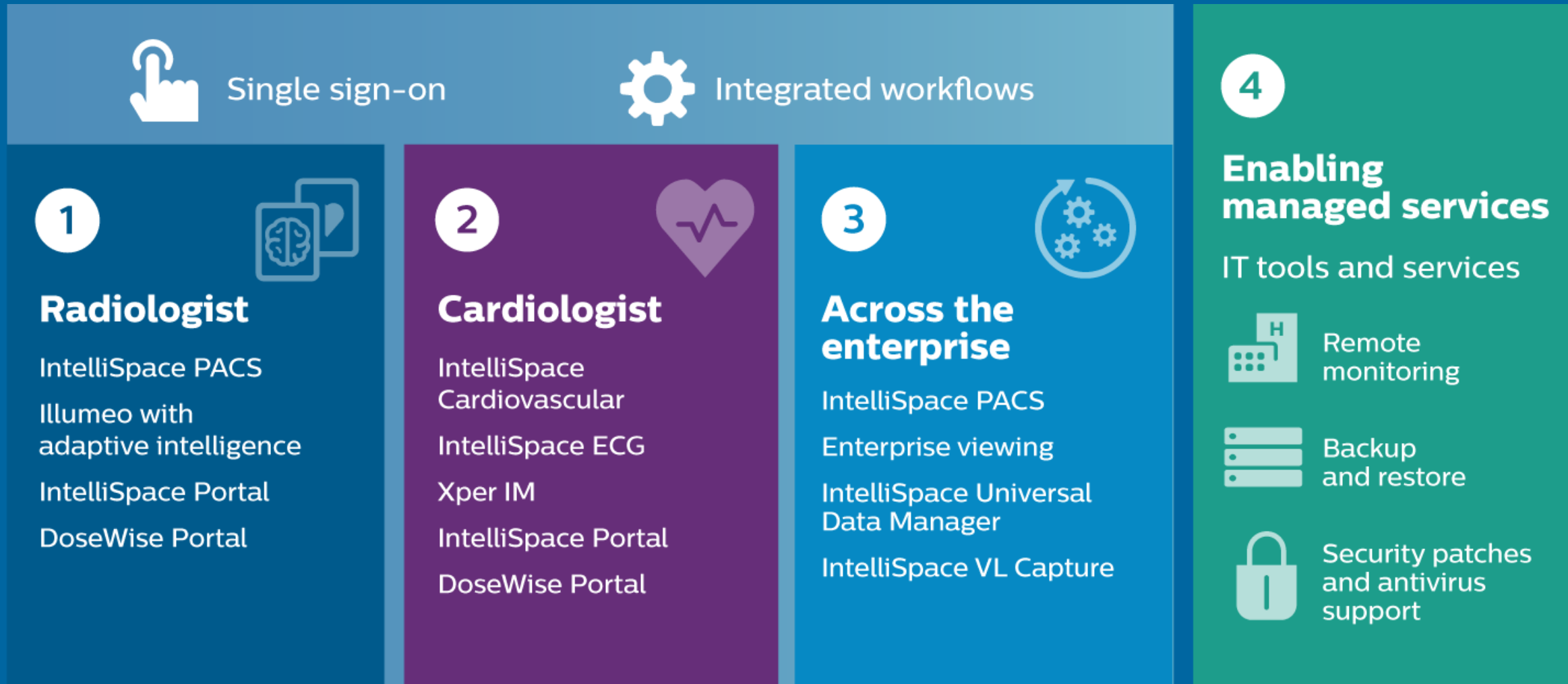
A unique, complete imaging IT managed service to meet the needs of a changing landscape



# IntelliSpace Enterprise Edition

Most competitors offer “best of suite” enterprise imaging capabilities for multi-ology viewing, VNA, advanced visualization, and integrated workflow.

IntelliSpace Enterprise Edition offers these as one managed service enabling you to effectively manage the expanse and expense of your clinical enterprise.



# IntelliSpace Enterprise Edition

## Service delivery comparison

We take responsibility for tasks that keep customers focused on strategy, patients, and competition in their market

Value elements	Traditional model	ISEE model
Hardware	Cost optimized for short term; lower flexibility	Cost optimized for longer term (TCO focus)
Backup and recovery	Backup and recovery needs to be setup by the customer for each product	Full data backup to recover from fatal crashes
Proactive infrastructure monitoring and problem resolution	Infrastructure monitoring customer responsibility	Centralized remote monitoring of HW infrastructure to proactively identify and fix issues
Updating of antivirus and security patches	Anti-virus and security patches list provided: customer responsible for ensuring that systems are up to date	Philips takes the responsibility of keeping system updated regularly
Domain management and SSO	Domain management is customer responsibility	Philips manages domain for all products to enable full SSO capabilities
Uptime guarantee (shared risk)	No uptime guarantees	99.99% uptime guarantees ensure risk-sharing and proactive support
Contract setup	Different contracts for different products; difficult to scale	Fully harmonized contracts, making scalability (up and out) extremely easy
Post-sales SoW experience	Product-centric SoWs	Solution-centric SoW; fully harmonized across products
Project implementation	Project teams for each product	Single-solution implementation team
Service delivery: Call Center setup	Optimized for product support: lower customer intimacy, product-centric intimacy	Optimized for solutions support: higher customer intimacy, dedicated TSE per customer; cross-product support
Service delivery: support process to resolution	Support process to resolution designed at a product level; SLAs and response times across products could differ	One support team for customer, with full ownership for closure

More Info: [IntelliSpace Enterprise Edition landing page in One Source](#)



## Selling against Fuji

# **Conclusion and recommendations**

# Conclusion and recommendations

- Philips offers a much deeper and wider set of offerings. We innovate across the health continuum, from supporting predictive and preventative care to connecting care in the home.
- Fuji can be viewed as a “niche player” (only in radiology and cardiology) when positioned against Philips.
- From a radiology perspective per KLAS, while viewed to be essentially on par with Philips in the radiology PACS space, Fuji radiology offerings do not stack up well against Philips latest advancements (Illumeo, RWS, advanced mammo, visible light, analytics).
- Fuji does not have an advanced visualization offering as comprehensive as Philips. They do not offer a standalone, EMR/PACS-agnostic AV solution (they are not ranked in the AV KLAS reports).
- From a cardiology perspective – per KLAS, Philips is positioned as a stronger player and does not require partnerships to offer complete solutions across the cardiovascular service line.
- Leverage the Philips Account Executive to collaborate on account needs, relationships, approach and strategy (especially at the CIO, CMIO and CFO levels). Ensure we position ourselves as a comprehensive HIT and imaging leader.
- If needed, consider utilizing IntelliSpace Enterprise Edition to elevate our position and change the game, especially at the C-level.

**By working with your account executive and other channels, you can position Fuji as a niche player. Philips offers a comprehensive portfolio of solutions to be positioned as a "core vendor" partner of choice with IDN and multi-facility health systems.**



**Learn more**

For more information, please go to [www.philips.com/Intellispace](http://www.philips.com/Intellispace)