Magic Quadrant for Clinical Communication and Collaboration

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Clinical communication and collaboration systems enhance care-team effectiveness, optimize nursing operations and reduce toil. When evaluating CC&C vendor solutions, healthcare provider CIOs and clinical leaders should consider notable vendors' foundational and differentiating capabilities.

Market Definition/Description

Clinical communication and collaboration (CC&C) systems are mobile platforms that clinicians, care teams, patients and caregivers use to collaborate on treatment and care activity within ambulatory, acute, post-acute and virtual care settings. CC&C systems improve situational awareness surrounding the patient and information sharing at the point of care and during care transitions. CC&C systems represent the convergence of conventional inpatient communications, such as telephony and paging, with modern channels enabled by mobility, interoperability and the Internet of Things (IoT).

CC&C solutions facilitate communication and collaboration among physicians, nurses, support staff and health system services. CC&C care teams increasingly include patients, caregivers and family members, making CC&C a viable tool for patient and family engagement and virtual care. CC&C can positively affect care outcomes, patient safety, care team efficiency, clinician productivity and morale, care coordination, and patient throughput and capacity management.

CC&C systems represent the convergence of conventional communication channels (such as telephony and paging) with modern devices and technologies (such as smartphones, secure chat, text messaging and video). Real-time and responsive care collaboration approaches are vital at the point of care and during care transitions. They are essential to satisfy increased consumer and patient expectations and key care quality measures that affect the organization's reputation and revenue goals.

CC&C systems improve operational efficiency by incorporating patient data in systems, such as patient flow, bed management, location services and resource scheduling systems (on-call, physician or nursing, for example). CC&C solutions are part of an emerging care team collaboration ecosystem, including interactive patient care, nurse call, resource scheduling systems, and alarms and notifications middleware.

Common CC&C use cases include:

- Accessing and viewing critical patient results

- Collaborating with care team members in real-time

- Engaging the patient and caregiver in care and treatment

- Enhancing the patient experience and reducing care team toil

- Improving patient safety and care quality measures

- Participating in virtual care encounters

- Managing medical device alarms and notifications

- Optimizing care handoffs and transitions

Must-Have Capabilities

- **Care team collaboration:** The ability to communicate and collaborate with care team members over secure and compliant channels, such as secure messaging, chat, unified communications and workforce collaboration platforms. Collaboration also includes task management and orchestration.

- **Critical results:** The ability to securely access, view and integrate patient information housed in the EHR, ancillary and other essential clinical systems to support CC&C workflows.

- **Secure messaging:** The ability to facilitate secure messaging and chat sessions among patients, care team members, support staff, community physicians and other legitimate stakeholders.

Standard Capabilities

The standard capabilities for this market include:

- **Alarm management:** The ability to connect to alarms and notification middleware to acquire, filter, escalate and manage medical device codes and alarms.

- **Interoperability:** The ability to acquire, exchange and integrate patient information with point-of-care, operational and patient and clinician context systems (nurse call, on-call, patient flow, and bed management systems, for example) using industry interoperability standards and protocols.

- **Voice/telephony integration:** The ability to initiate and receive voice calls and integrate with Session Initiation Protocol (SIP), PBX and VoIP technologies.
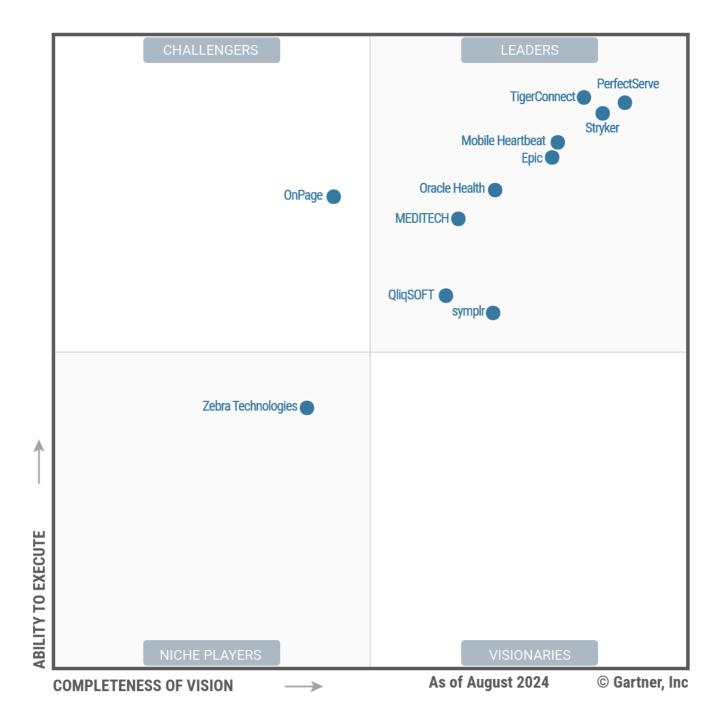
Optional Capabilities

- **Analytics/reporting:** The ability to capture, analyze, report on, and optimize patient and care team activity.

- **Patient/family engagement:** The ability to include the patient, family members and caregivers in the care team communications, collaborative sessions and workflows.

Magic Quadrant

Figure 1: Magic Quadrant for Clinical Communication and Collaboration

Vendor Strengths and Cautions

Epic

Epic is a Leader in this Magic Quadrant. Epic does 100% of its business in the healthcare sector. Its customers include notable health systems, hospitals, clinics, specialty care groups, labs and payers. Epic's clinical communication and collaboration (CC&C) products include Epic Secure Chat, Epic Video Client, Hello World and Epic Voice over IP (VoIP).

The CC&C platform natively integrates with Epic's electronic health record (EHR) enterprise software suite, enabling its major applications' workflows to utilize CC&C capabilities. The vendor's CC&C capabilities are also available on desktops and iOS/Android mobile devices.

Epic has begun embedding generative AI (GenAI) in CC&C workflows. Provider organizations that are live on Epic can also extend the platform to external non-Epic providers.

Strengths

- **Interactive customer collaboration:** Epic actively collaborates with customers to identify products and services by providing its customers opportunities to influence the design of the CC&C platform. This includes direct collaboration with Epic R&D staff, interaction with a designated Epic support team and participation in user group events.

- **Integrated product suite:** Epic's pricing model is administratively simple and includes all communication and collaboration channels it currently offers, with the option to be licensed individually. Epic's CC&C products embed communication workflows into Epic's product suite (EpicCare Ambulatory, EpicCare Inpatient, MyChart, Cheers CRM, Healthy Planet, etc.).

- **Overall viability:** Epic is a closely held company with approximately 5,000 employees dedicated to R&D activities. Along with no funded debt, its corporate equity continues to increase annually as its inpatient electronic health record (EHR) platform and market presence expands globally.

Cautions

- **Limited platform access:** Epic's CC&C products are tethered tightly to its EHR platform. In order to access Epic's CC&C capabilities, healthcare provider organizations must install Epic's EHR platform or be affiliated with a healthcare provider that is live on an Epic EHR platform.

- **Inflexible pricing:** In 2023, Epic contracted 1,479 hospitals and 25,012 clinics for new or additional CC&C products. With this critical mass and EHR-related CC&C buying momentum, potential customers may find it challenging to negotiate with Epic on pricing or to lower the total cost of ownership (TCO) of Epic's CC&C products effectively.

- **Enterprise agreement required:** Epic's EHR product footprint will continue to expand as will the adoption of its enterprise agreement. This will lead to decreased department-specific control and influence over the IT budget, application portfolio and strategic roadmap.

MEDITECH

MEDITECH is a Leader in this Magic Quadrant. MEDITECH does 100% of its business in the healthcare sector within the inpatient, ambulatory, long-term care, home-care and virtual care venues. It has installations in the U.S., Canada, EMEA and APAC. Its customers include practices, outpatient clinics, community hospitals, medical centers and integrated delivery networks.

MEDITECH is predominantly an EHR solution vendor with its cloud-based Expanse EHR platform, which includes CC&C products and capabilities. It is working on augmenting Expanse's workflows through CC&C integration, as well as automating CC&C workflows through predictive and smart AI.

Strengths

- **Tested for utility and value:** MEDITECH hosts executive advisory sessions, customer user panels and targeted focus groups, and performs end-user experience analysis. Before broader deployment, new solutions and features are tested at pilot sites to gain feedback on utility and value. MEDITECH also analyzes competitive wins and losses to assess the strength of its Expanse portfolio relative to buyer requirements.

- **Audience-specific platforms:** MEDITECH's Expanse EHR platform includes CC&C products and capabilities such as Expanse Now (for physicians), Expanse Point of Care (for nurses), Expanse Patient Connect, and the Patient & Consumer Health Portal. Expanse Patient Connect enables communication around patient appointments and uses sentiment analysis and natural language understanding to route patient responses intelligently. MEDITECH's Patient & Consumer Health Portal allows patients and family members to access results, collaborate as a care team with portal messaging and initiate virtual visits.

- **Overall viability:** MEDITECH is a privately held company with approximately 3,000 employees dedicated to product R&D and support activities. Its annual headcount is stable, and its customer retention rate is very high.

Cautions

- **Restrictive platform access:** MEDITECH's CC&C capabilities are not available to non-MEDITECH healthcare providers. They are tethered tightly to its EHR platform and workflows. To access them, healthcare provider organizations must install MEDITECH's Expanse EHR.

- **Limited transparency:** MEDITECH is a privately held company that does not share its financial information publicly (and is often only available to prospective customers upon request). Private companies are not subject to SEC scrutiny, regulations, or reporting requirements, so additional effort is required to assess the company's financial viability.

- **Geographic strategy:** While MEDITECH deploys its EHR platform outside of the U.S. and Canada, it has a limited number of non-North American installations, making up approximately 15% of total active implementations. While MEDITECH's global footprint appears to be growing with the introduction of its Expanse platform, its ability to localize its product suite to support different languages and geographies should be carefully assessed by prospective international clients.

Mobile Heartbeat

Mobile Heartbeat is a Leader in this Magic Quadrant. Mobile Heartbeat is a wholly owned subsidiary of HCA Healthcare that does 100% of its business in the North American healthcare sector within acute, ambulatory, long-term and home-care venues. Mobile Heartbeat's platforms are architected to facilitate integrations with nurse call, alerts and alarms, back-office collaboration, EHR, and other clinical and operational systems.

Mobile Heartbeat's on-premises CC&C solution, MH-CURE, and its Banyan cloud-based platform provide a consolidated user experience for CC&C needs, and leverage iOS and Android devices for end users. In addition to its CC&C platforms, it offers professional services to support its customers' product journey from presales through maturity.

Strengths

- **Open architecture:** Mobile Heartbeat's platforms are based on an open architecture that supports enterprisewide CC&C at scale. Its solutions extend clinical collaboration beyond the EHR platform to support a wide range of clinical workflows. Its extensive reporting and analytics provide detailed usage feedback that enable efficiency improvements.

- **Interoperability:** MH-CURE and Banyan support interoperability with nurse call systems, clinical alerts and alarms middleware, and unified communication platforms. It also provides the patient management,operational and clinical systems required to support care delivery.

- **Strong integrations:** Mobile Heartbeat's platforms can integrate deeply with ServiceNow (an IT operations workflow automation platform) to support submission of clinical ticket

workflows including equipment failures. Its AI chatbot helps streamline this process for busy clinical staff. Its integration with Microsoft Teams facilitates communication and collaboration between clinical and back-office staff.

Cautions

- **Limited patient engagement:** Mobile Heartbeat's patient engagement feature is limited to voice only, using only the patient bedside telephone for clinician-to-patient communication. Potential customers prioritizing patient engagement features should be cautious.

- **Limited virtual care:** Mobile Heartbeat's products have limited utility for home-based and virtual care use cases. Capabilities such as remote monitoring may require third-party partners.

- **Limited provider footprint:** Mobile Heartbeat is a wholly owned subsidiary of HCA Healthcare, which constitutes a significant portion of its client base.

OnPage

OnPage is a Challenger in this Magic Quadrant. OnPage does 100% of its business in the North American and Latin American healthcare sectors, encompassing diverse settings that include acute care facilities, outpatient clinics, long-term care facilities and home-care environments. Its system supports role-based alerting, enabling organizations to improve the responsiveness of care teams.

OnPage's suite includes cloud-based CC&C features that are accessible through its mobile app and managed through its web console. Its CC&C solutions include on-call scheduling, escalation routing, device alert notifications, critical results, and patient and family engagement. OnPage has a complete management suite to help its customers monitor and manage CC&C traffic.

Strengths

- **Integrations:** OnPage's full suite includes integrations with collaboration tools such as Microsoft Teams, Slack (Salesforce), and OpenEMR. The OnPage BlastIT application provides mass notification capabilities.

- **Scheduling:** OnPage provides a powerful scheduling system using a built-in scheduler for on-call with escalation pathing and dynamic schedule change management. This feature

allows for schedule adjustments, accommodating unexpected changes and ensuring continuous coverage. The on-call scheduler is accessible from OnPage's mobile app, ensuring accessibility and real-time updates wherever needed.

- **Pager replacement:** OnPage has an extensive pager replacement experience, an important factor for many hospital systems looking to modernize their endpoint devices.

Cautions

- **Emerging CC&C capabilities:** OnPage has offered secure messaging and incident management capabilities since 2014. As a Challenger, its traditional pager replacement offering has been incrementally enhanced to include critical support for CC&C use cases.

- **Lack of virtual care:** OnPage's platform does not natively support videoconferencing-based virtual care use cases. At the time of this research, it has no bidirectional video chat capability.

- **Lagging AI incorporation:** OnPage is trailing in building out AI for its products. AI-based user interface enhancements are considered the next step in user experience improvements.

Oracle Health

Oracle Health is a Leader in this Magic Quadrant. It does 100% of its business in the healthcare sector, including acute, ambulatory and physician practice care venues. Oracle Health's CareAware CC&C solution is installed in North America, EMEA and APAC health systems and services.

Oracle Health's CC&C product suite delivers voice, messaging, secondary alarm notifications and clinical mobility via integration with its EHR. Oracle Health's CC&C product suite includes Oracle Health EHR Nursing Mobility (formerly CareAware Connect), Oracle Health Messenger, Oracle Health Voice, Oracle Health Care Team Assignments and Oracle Health Event Management.

Strengths

- **Marketing strategy:** Oracle Health works closely with the healthcare provider C-suite (the CNO, CNIO, CIO and CFO). Its market strategy goal is to understand and explain how its CC&C platform can improve KPIs in nursing operations, digital care delivery, and financials.

- **Global presence:** In addition to many notable North American hospitals and health systems, Oracle Health provides support in EMEA and APAC. These installations and CC&C product offerings are deployed on-premises, over private clouds and through public cloud service providers.

- **Product offerings:** The Oracle Health EHR Nursing Mobility product includes secure communication capabilities that adhere to real-time health system (RTHS) principles. The product transfers critical lab results and data from the EHR to support care-team collaboration and situational awareness surrounding the patient. Its configurable parameters allow emergency events to be prioritized, with notifications sent to the appropriate care-team members based on roles and patient assignments.

Cautions

- **Stationary business model:** Oracle Health expects no significant changes to its CC&C business model but anticipates platform expansion into home-care and virtual care markets. Since these are not new venues for CC&C solutions, it portends a conservative CC&C vision and product roadmap, with more services provided by third-party partners year over year.

- **Overall viability:** The adoption of Oracle Health's CC&C platform corresponds with the penetration of its Oracle Health EHR. In 2023, Oracle Health lost customers due to healthcare provider decisions to switch EHRs. As Oracle Health's EHR footprint is negatively impacted by EHR replacement and M&A activity, reducing its total addressable market, it has experienced increased user growth among its existing customer base.

- **Workflow/automation:** Oracle Health's CC&C platform currently has limited workflow orchestration and process automation.

PerfectServe

PerfectServe is a Leader in this Magic Quadrant. PerfectServe does 100% of its business in the North American and EMEA healthcare sectors within the acute, ambulatory, long-term care and virtual care venues. PerfectServe's CC&C platform provides secure communication, pager replacement, nurse mobility, patient and family communication, provider and staff scheduling, a hospital operator console, and a medical answering solution for physician practice communication.

PerfectServe's Dynamic Intelligent Routing utilizes care-team assignments, schedules and other integrated information to route messages to the right person in real time. The platform has deep integrations with nurse call, the EHR, and alarms and notification systems.

Strengths

- **Flexible access:** PerfectServe is a cloud-native platform designed to provide endpoint flexibility for mobile device and web access. This flexibility enables the use of both corporate devices and personally owned patient and family devices.

- **Diverse care venues:** PerfectServe enables patient-centered communication regardless of location, including patient home, clinics, rehabilitation and other care venues outside of the hospital. PerfectServe also supports virtual care use cases.

- **Strong integrations:** PerfectServe's integrations cover all major CC&C contributing technologies including lab, radiology, patient transport, real-time location system (RTLS), telephone/PBX and paging, as well as other CC&C solutions.

Cautions

- **Limited geographic strategy:** Although PerfectServe covers North America and EMEA, its current support staff is in North America. PerfectServe uses channel partners for non-North American client sales and support.

- **Care-team experience:** PerfectServe's ability to consolidate, route and deliver patient-related event information can contribute to alert and alarm fatigue for clinical staff. Potential customers considering PerfectServe should plan on spending substantial time setting up rules or engaging Perfectserve's professional services.

- **Marketing execution:** PerfectServe Unite consists of five distinct products priced and licensed separately and can be bundled and branded under PerfectServe Unite. That said, PerfectServe market messaging does not clearly explain the relationship between the various acquired products and the larger PerfectServe Unite platform. Buyers may view this as a potential integration challenge.

QliqSOFT

QliqSOFT is a Leader in this Magic Quadrant. QliqSOFT does 100% of its business in the healthcare sector within inpatient, outpatient and virtual care venues — including healthcare systems, hospitals, ambulatory clinics and home health facilities in North America.

QliqSOFT's secure text message offering, QliqCHAT, is complemented by its Quincy chatbots, Quincy +CHAT Secure Patient Communication and Quincy Virtual Visits. The QliqSOFT CC&C platform consolidates multiple point solutions for secure messaging, care-team information sharing and custom form development for recipient-reported data. In 2023, QliqSOFT initiated multistep campaign automation to support patient population outreach.

QliqSOFT is integrating secure patient texting within three contact center solutions: Genesys, RingCentral and Nice. This will increase patient convenience and simplify communication between contact center staff and individuals outside of the acute care setting.

Strengths

- **Market understanding:** QliqSOFT closely tracks the market needs of each market segment within the vertical (ambulatory, acute, postacute) by following regulations, subscribing to industry publications, attending conferences, reading research, and talking to prospects, analysts, and thought leaders to understand pain points and competitor solutions.

- **Market strategy:** QliqSOFT creates differentiated messaging for each vertical segment determined by market and competitive analysis, which is incorporated into website content, thought leadership, social media marketing, and sales enablement/training. For new capabilities or enhancements to existing products, QliqSOFT recruits clients to pilot them and quantify value.

- **Sales strategy:** QliqSOFT's sales strategy includes working with EHR solution vendors and reseller partners. An inbound sales team identifies and works with qualified leads, and a consultative sales group conducts cold calls and digital outreach, and follows up on conference leads.

Cautions

- **Geographic strategy:** QliqSOFT does not deploy its platform outside North America or localize its product suite to support different languages and geographies, making it unsuitable for international customers.

- **Outpatient CC&C vision:** QliqSOFT's CC&C platform centers on secure messaging, care-team collaboration, patient engagement and virtual care. QliqSOFT does not currently

support acute care requirements, such as real-time medical device integration or alarms and notifications management.

- **Limited voice support:** QliqSOFT's CC&C platform does not support PBX integration or provide pager emulation.

Stryker

Stryker is a Leader in this Magic Quadrant. Stryker is headquartered in Kalamazoo, Michigan, U.S. Stryker does 90% of its business in the healthcare sector within acute, ambulatory and long-term care venues. It is a global company with customers in North America, EMEA and APAC, and its CC&C products and services are deployed in approximately 3,000 hospitals and health systems.

Stryker is a global medical device and technology company. It entered the CC&C market in February 2022, acquiring the established CC&C vendor, Vocera Communications. Stryker's CC&C portfolio includes its Vocera Clinical Communication and Workflow Platform, Vocera Edge smartphone app for clinical communication, Vocera Engage middleware for interoperability and alarm management, Vocera Ease patient and family communication products, and its Vocera Smartbadge and Vocera Minibadge, hands-free wearable devices.

Stryker did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Care-team support:** Stryker simplifies nursing and care-team workflows and improves communications with intelligent routing, prioritization and escalation of calls, texts, notifications and alarms.

- **Clinician engagement:** Stryker's clinical communication and workflow solution helps to strengthen staff safety and reduce alarm fatigue, cognitive burden, and time to action or intervention.

- **Diverse user access:** Stryker enables hospital staff to communicate by voice or text using their device of choice: hands-free badge, smartphone, desk phone, laptop or workstation.

Cautions

- **Fewer smartphone deployments:** Most of Stryker's CC&C installations are Smartbadge or Minibadge only. While these voice-activated, hands-free wearables are CC&C market

differentiators, they are not typically installed enterprisewide, limiting their overall impact.

- **Redefined market:** EHR megasuite vendor offerings will remain a constant replacement threat, given their increasing market footprint, their embedded CC&C capabilities, and the scope of their enterprise agreements. Stryker and others will continue to compensate for CC&C capability gaps. However, as megasuite CC&C offerings mature, stand-alone CC&C vendor platforms must innovate and redefine the market instead of augmenting EHR functionality.

- **Corporate strategy:** The strategic importance of the Vocera acquisition to Stryker's product suite is both evident and unclear, leaving the market wondering about Stryker's commitment to the CC&C space.

symplr

symplr is a Leader in this Magic Quadrant. symplr does 100% of its business in the healthcare sector within the acute, ambulatory, long-term and virtual care venues. It acquired its CC&C product from Halo Health in 2021.

symplr's CC&C product suite includes its Clinical Communications SaaS platform and EHR collaboration and Nurse Mobility modules. symplr's CC&C offering is a component of its more extensive next-generation workforce management for healthcare platform. symplr's patient and caregiver engagement and care coordination capabilities continue to evolve in concert with emerging market requirements.

Strengths

- **Support for staff shortages:** symplr's innovative and expansive view of workforce management in healthcare includes a pivotal and differentiating role for CC&C. symplr's CC&C platform optimizes care-team productivity, collaboration and nursing operations to help mitigate significant clinical staffing shortages.

- **Facilitates new staffing models:** The real-time integration of symplr's CC&C and Physician Scheduling products will facilitate emerging team-based staffing models. Integrating these products with symplr's workforce management platform will enable industry movement toward on-demand staffing.

- **AI innovation:** symplr's CC&C SaaS platform will handle increasingly complex CC&C workflows by appropriately augmenting and automating manual messaging tasks. The

increased use of AI/ML provides the necessary healthcare team context to optimize care-team communication.

Cautions

- **Geographic strategy:** symplr only deploys its platform in North America and does not localize its product suite to support different languages and geographies, making it unsuitable for international customers.

- **Vertical/industry strategy:** symplr's Clinical Communications product does not broadly support patient and family engagement use cases. symplr acknowledges the importance of patient engagement as part of a broader communication strategy. It has, however, prioritized role-based caregiver communication to keep the solution focused on the communication elements most critical to real-time care delivery. It says this limits the influence of other communication sources that might distract from that pursuit or add to communication overload in the complex clinical environment.

- **Overall viability:** symplr is a privately held company backed by private equity investment firms Clearlake Capital and Charlesbank Capital Partners and is not subject to SEC scrutiny, regulations or reporting requirements, so additional effort is required to assess its financial performance.

TigerConnect

TigerConnect is a Leader in this Magic Quadrant. TigerConnect does 100% of its business in the North American healthcare sector within the acute, ambulatory, critical access, clinic, practice, home health and hospice care venues. Its products include its cloud-native clinical collaboration platform, TigerConnect Patient Engagement, TigerConnect Physician Scheduling, and TigerConnect Alarm Management and Event Notification products.

Its Critical Alert solution set includes a workflow engine and designer that provides rule-based CC&C flows for patient clinical events that integrate with its native nurse call system and third-party nurse call platforms.

Strengths

- **Comprehensive platform:** TigerConnect's suite of products provides a comprehensive collection of CC&C capabilities that support the critical communication needs of a modern healthcare provider environment.

- **Strong integrations:** TigerConnect has strong integration capabilities with the EHR, nurse call systems, alarms and notification systems, scheduling, IT service management (ITSM) and support surrounding workflows and virtual care use cases. It also includes a compliant method for keeping the patient and family informed.

- **Flexible access:** The platform provides flexible and secure text, voice and video communication through its smartphone application available on common application marketplaces, as well as browser and desktop apps.

Cautions

- **Geographic strategy:** TigerConnect only deploys its platform in North America and does not localize its product suite to support different languages and geographies, making it difficult to use for international customers.

- **Customer experience:** End users have reported slower response times than expected for customer support assistance.

- **Product complexity:** Users of TigerConnect's multiple products may find it difficult to navigate across the large number of application features and capabilities. This complexity can make the user experience challenging when crossing from one application function to another.

Zebra Technologies

Zebra is a Niche Player in this Magic Quadrant. Zebra is a global mobile computing company that primarily manufactures portable communication and mobile bedside clinical application endpoint devices installed in care venues across North America, EMEA, LATAM and APAC regions. Zebra Workcloud Solutions include workforce automation tools that enable customers to optimize their scheduling, timekeeping, task management and communication efforts.

Its primary capability enables reliable device-to-device communication through its push to talk (PTT) technology and voice communications via a secure enterprise platform for running mobile apps for clinical staff (nurses). Zebra provides robust integrations with RTLS to track patient and staff locations.

Strengths

- **Hardware manufacturing:** Zebra is a leading manufacturer of clinical environment-ready point-of-care devices, including handheld communication devices, bar code scanners and label printers. In recent years, it has expanded into software offerings, positioning itself as an end-to-end solution provider.

- **Endpoint integration:** Zebra's mobile computers, bar code label printers and scanning devices are integral to positive patient identification and supply-chain/logistics solutions used in hospitals globally. Its devices enable healthcare professionals to streamline workflows, enhance patient safety and improve operational efficiency.

- **Global partner ecosystem:** Zebra solutions are reliable and trusted in demanding clinical environments across multiple geographies, supported by specialized healthcare partners. Zebra's extensive partnerships and interoperability across platforms allow customers to achieve unique CC&C solutions that are tailored to their specific needs in both acute and post-acute environments.

Cautions

- **EHR integration:** Zebra's Workcloud Communication suite of tools does not support linking live communication to the patient's clinical context within its mobile app.

- **Focused CC&C:** Zebra does not create alert and alarm software but is interoperable with leading providers.

- **Business model:** Zebra was historically focused on selling its purpose-built hardware solutions for the healthcare industry. It has optimized its hardware and endpoint operating system platform for CC&C use cases, features and capabilities.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

MEDITECH

Zebra Technologies

Dropped

Andor Health: This vendor did not satisfy the inclusion criteria.

Inclusion and Exclusion Criteria

To qualify for inclusion in this body of research, CC&C vendors must demonstrate:

- They do most of their business in the healthcare provider space (ambulatory, inpatient and post-acute care spaces).

- Their platform includes competitive product offerings that align with the various CC&C critical capabilities, minimally those designated as must-have:

  - **Care-team collaboration:** The ability to communicate and collaborate with care team members over secure and compliant channels, such as secure messaging, chat, unified communications and workforce collaboration platforms. Collaboration also includes task management and orchestration.

  - **Critical results:** The ability to securely access, view and integrate patient information housed in the EHR, ancillary and other essential clinical systems to support CC&C workflows.

  - **Secure messaging:** The ability to facilitate secure messaging and chat sessions among patients, care team members, support staff, community physicians and other legitimate stakeholders.

- Have 10 or more healthcare provider customers in production deployments.

- Support a combination of on-premises, hosted, hybrid and cloud service delivery models.

- Offer, directly or through partnerships, implementation and support services for their platform.

- Integrate with the ecosystem of care-team collaboration vendor solutions (including nurse call, clinician/staff scheduling, contact center and interactive patient care)

commonly found in healthcare provider application portfolios.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors based on the quality and efficacy of the systems, methods, or processes that enable vendor performance to be competitive, efficient, and effective and to impact revenue, retention, and reputation positively. Ultimately, vendors are evaluated on their ability and success in capitalizing on their vision.

Criteria for product or service, market responsiveness/record, and customer experience are weighted high. These are often the primary drivers for vendor selection with potential buyers. Buyers express the most interest in product functionality, the vendor's ability to deliver against objectives, and overall satisfaction with the vendor.

Criteria for overall viability and sales execution/pricing are weighted medium. This ensures vendors have sufficient investment and growth in their product, support diverse customer requirements, and have a track record of maintaining long-term customer relationships. While not heavily weighted, criteria for operations, which refer to a vendor's ability to provide implementation, support and consistent delivery, are a minimum requirement and foundational to market success.

Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High

Evaluation Criteria	Weighting
Marketing Execution	Medium
Customer Experience	High
Operations	Low

Source: Gartner (November 2024)

Completeness of Vision

Gartner evaluates each vendor's ability to articulate its current and future market direction, innovation, customer needs and competitive forces. Vendors are rated on their understanding of how market forces can be exploited to create opportunities.

Criteria for market understanding, marketing strategy, offering (product) strategy, and vertical/industry strategy are weighted high. In terms of vision, these criteria are the most impactful in a buyer's decision. Buyers are looking for vendors that understand the trends and changing dynamics in healthcare, offer depth and breadth in their product portfolio, have a strong product roadmap, and can support their business needs.

Criteria for innovation and sales and geographic strategies are weighted medium. This refers to a vendor's ability to adapt or evolve its product suite and sales approaches as new market requirements and technical innovations emerge across various geographies. While not heavily weighted, business model criteria refer to vendors' ability to adapt or evolve their business model as needed and that they have a consistent vertical focus.

Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	High

Evaluation Criteria	Weighting
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	High
Innovation	Medium

Source: Gartner (November 2024)

Quadrant Descriptions

Leaders

Leaders are in the strongest position to influence the CC&C market's direction. They demonstrate a market-defining vision of how CC&C will evolve. Leaders can execute against that vision through their organization's capabilities, business model and platform. They have shown business results in the form of references and growth. They excel in their combination of market understanding, innovation, platform features and overall viability. While maintaining a well-established base of long-term customers, Leaders consistently win new deals and deliver successful implementations. Their customers are deployed in several geographic regions and are often the vendors against which other vendors measure themselves.

Challengers

Challengers have established presence, credibility and viability and have demonstrated the ability to meet customers' expectations. However, they have not shown the same leadership or innovation as the Leaders. Challengers tend to have a good technology vision but may not have adequate foresight to define the future of the CC&C market. Challengers are well-

placed to succeed in the market. They are often a good choice for organizations that value execution and a broader integrated product suite over vision.

Visionaries

Visionaries are ahead of most potential competitors in delivering innovative capabilities and sophisticated CC&C experiences. These vendors embody trends that are shaping the CC&C market. There may be some need for more awareness of the overall market and concerns about the ability to execute the full extent of their vision. Visionaries have strong innovation and robust product roadmaps. Visionaries are an excellent choice for organizations that want innovation and are willing to push the boundaries of what's perceived as possible. Visionaries that add execution power to their innovative platforms can become Leaders. Visionaries are the most likely to be acquired by more prominent platform vendors.

Niche Players

Niche Players often offer compelling CC&C solutions. Still, they may also:

- Be limited in architectural and deployment flexibility.

- Lack specific key functional capabilities.

- Lack the ability to deliver across multiple geographies.

- Lack the ability to support the requirements of large enterprises.

- Lack the ability to implement complex global deployments.

Niche Players are not winning new customers across multiple geographies as fast as their mainstream counterparts. Niche Players can often offer the best solutions to meet the needs of particular and well-defined CC&C use cases. When a Niche Player is a good fit, it will likely provide a much better price-to-value ratio and a time-to-market advantage. Some Niche Players demonstrate a degree of vision that suggests they might become Visionaries, but they might struggle to make this vision compelling. Other Niche Players may have the opportunity to become Challengers if they continue to develop their platforms to improve their overall execution. They may also work to establish a track record of continual innovation.

Context

CC&C solutions have traditionally facilitated communication among physicians, nurses and support staff care teams. CC&C increasingly includes patients, caregivers and family members in the care team, making CC&C a viable tool for patient/provider engagement and, in some cases, virtual care. CC&C can positively affect patient safety, care-team efficiency, nursing productivity and morale, care coordination, and patient throughput challenges. CC&C systems represent the convergence of conventional inpatient communications with modern channels.

New care collaboration channels are vital at the point of delivery and during care transitions. They are essential to satisfy increased consumer and patient expectations and key care quality performance measures that affect provider reimbursement and revenue. Due to the persistent need of healthcare providers to improve operational efficiency, CC&C systems increasingly take advantage of patient data in systems, such as patient flow, bed management, location services and resource scheduling systems (e.g., on-call, physician and nursing). CC&C solutions are part of an emerging care-team collaboration ecosystem that includes interactive patient care, nurse call, resource scheduling systems, and alarms and notifications middleware.

When considering a CC&C platform acquisition or deployment:

- Focus CC&C initiatives on the tasks that erode care team morale and well-being, and that contribute to clinician burden and burnout.

- Favor CC&C solutions that include patient engagement capabilities that improve care quality, such as pretreatment and posttreatment follow up, real-time family and caregiver communications, and virtual rounding.

- Select a CC&C solution that interoperates with the care-team collaboration IT ecosystem, such as nurse call, on-call scheduling, interactive patient care platforms. location services, and IoT devices.

- Select a CC&C product offering that aligns with CC&C's critical capabilities and exhibits real-time health system characteristics and behaviors (i.e., situationally aware, collaborative, smart).

- Understand the vendor product roadmap and associated time frames to determine how closely they align with your business priorities before purchasing a CC&C platform.

Market Overview

Handheld devices — such as wearable devices, wireless handsets and tablets — have been part and parcel of nursing operations for some time. CC&C solutions, to varying degrees, accommodate these legacy devices while actively adopting more modern and interoperable Android and iOS smartphones, tablets and hands-free devices. The CC&C space continues to evolve as CC&C vendors work closely with their healthcare provider clients to refactor and refine their platform capabilities.

CC&C can enhance patient safety and improve the patient experience, care-team productivity, care quality measures, employee satisfaction and morale. The economics of care delivery have created an abiding need for alternatives to existing care delivery models (especially virtual care) that address inefficient clinical operations, care quality and patient experience shortcomings.

CC&C systems continue to evolve as value-based care performance incentives accrue to healthcare providers. CC&C can remediate the inefficient clinical workflows, disjointed care-team handoffs, and care transitions that still characterize many interactions between care teams and patients. More patient engagement and virtual care features and capabilities have surfaced in CC&C platforms. All CC&C vendors foresee that patients, their families and caregivers will become important care-team participants in the future.

CC&C platforms will continue to evolve in concert with real-time healthcare system (RTHS) characteristics and capabilities, and will increasingly become:

- **Aware:** CC&C platforms will become increasingly "situationally aware" with real-time, enterprise-level visibility into essential clinical and patient event information derived from current and historical sources. Pervasive situational awareness surrounding the consumer, patient, clinician and other critical resources will provide essential CC&C operational intelligence.

- **Collaborative:** CC&C platforms will become increasingly collaborative. Collaboration is higher-order communication and the convergence of point-of-care solutions, interoperability middleware, IoT and analytics. It is not enough for care-team members to communicate via mobile channels — they must share patient information and context with colleagues and adjacent IT systems in real time.

- **Smart:** CC&C platforms will become increasingly automated and autonomous in pursuit of their care delivery objectives. They will use real-time operational intelligence to appropriately intervene and orchestrate essential clinical workflows and processes within the patient's context.

CC&C platforms will become more competent, predictive and automated as they acquire and activate curated and AI-augmented operational intelligence. This will be derived from the real-time situational awareness systems (including resource scheduling, patient flow and EHR) and technologies (like IoT endpoints, location services and ambient intelligence) that surround patient and provider workflows.

CC&C survey responses for this Magic Quadrant indicate the following:

- CC&C vendors are moving from clinical communication and collaboration to workflow orchestration that leverages AI to realize the promise of RTHS.

- Staff shortages and workplace violence continue to be a growing concern. CC&C technology solution vendors are beginning to address these challenges — with hands-free wearable devices under personal protective equipment (PPE), employing product panic features, intelligent alarm management to reduce cognitive burden, and advanced family communication capabilities to improve efficiency and staff/patient satisfaction.

- Team-based staffing models have become more prevalent as organizations cope with staffing shortages. As the size and scope of the typical care team grow, there are more opportunities for communication failures. CC&C platforms can now effectively handle complex, role-based teams without creating more administrative burdens for staff to manage.

- Due to constrained budgets, increased labor costs and inflationary pressures, new customer sales and upgrades to existing customers will require more emphasis on delivering ROI than previously.

- Supporting more postacute care, hospital-at-home, and home-care workflows will drive CC&C vendor planning roadmaps.

- A new focus on staff safety and wellness to counter industry staffing shortages, retention issues, and greater competition for the skilled workforce will require CC&C vendors to demonstrate how they can reduce care-team toil and burnout, and increase workplace satisfaction.

- AI and machine learning are entering CC&C products through workforce/scheduling optimization, location-based routing and tracking, and messaging/scheduling data to infer a clinician's burnout potential.

- Health system clients continue to migrate away from department-specific tools and toward enterprise solutions.

⊕ Evidence

⊕ Evaluation Criteria Definitions