PERFORMANCE REPORT

December 2014

Healthcare Analytics Performance

THE DATA DELUGE: WHO DELIVERS VALUE?

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NOTE: Performance scores may change significantly when including newly interviewed provider organizations, especially when added to a smaller sample size like in emerging markets with a small number of live clients. The findings presented are not meant to be conclusive data for an entire client base.

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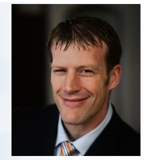
The Data Deluge: Who Delivers Value?

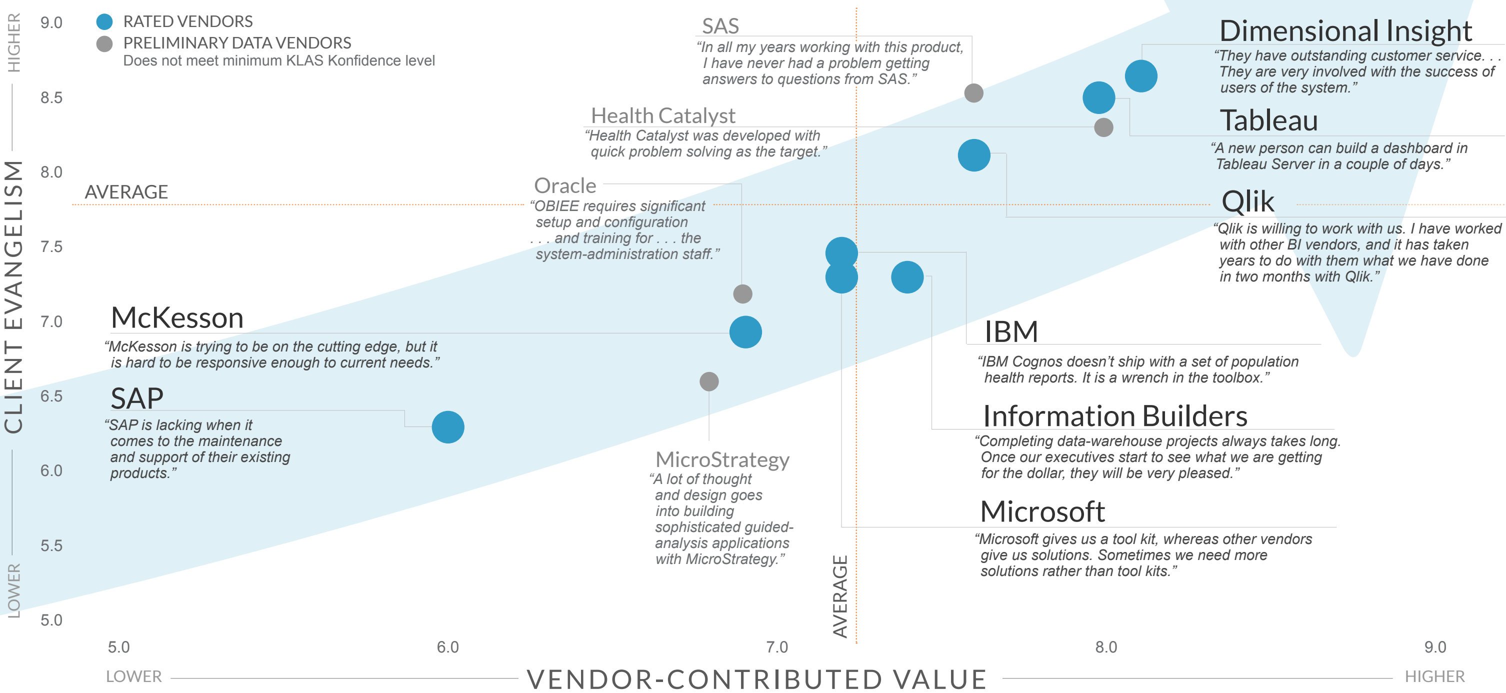


JOE VAN DE GRAAFF
REPORT AUTHOR

The deluge of data in healthcare is accompanied by a growing number of vendors, many affirming vast analytics capabilities. In a world where innovation and future strategy often make the headlines, KLAS takes a unique approach by focusing on and highlighting the customer experience. The result? A look into value and vendor performance as reported by 463 healthcare providers.

VALUE AND EVANGELISM | WHO STANDS OUT?

According to healthcare providers, looking beyond just platform capability, how involved and active are vendors in delivering value?



Vendor-Contributed Value reflects a composite score of client-reported reviews on vendors in areas such as speed to value, implementation timeliness, product ease of use, delivery of new technology, proactive vendor service, and vendor living up to expectations. | Client Evangelism refers to healthcare provider willingness to actively recommend the vendor to their peers.

SUMMARY VIEW: PERFORMANCE OF BROAD-USE BI VENDORS

Broad-Use Vendors: BI platforms typically used for broad/varied cases across an enterprise

OVERALL PERFORMANCE	Score	CHANGE SINCE 2013	KLAS-ESTIMATED MARKET PRESENCE	KLAS-VALIDATED ENTERPRISE USE
Dimensional Insight *The Diver Solution*	90.8	↑	SOMEWHAT COMMON	COMMON
Tableau *Tableau Server*	87.1	↓	SOMEWHAT COMMON	LESS COMMON
Qlik *QlikView*	84.6	↔	SOMEWHAT COMMON	SOMEWHAT COMMON
Information Builders *WebFOCUS*	80.3	↑	LESS COMMON	COMMON
IBM *Cognos Enterprise*	79.1	↔	SOMEWHAT COMMON	COMMON
Microsoft *Microsoft BI Solutions*	78.1	↑	SOMEWHAT COMMON	SOMEWHAT COMMON
McKesson *Business Intelligence Suite*	73.4	↓	COMMON	SOMEWHAT COMMON
SAP *BusinessObjects Business Intelligence*	67.7	↓	COMMON	COMMON
Preliminary Data Vendors				
Health Catalyst EDW (n=11)	89.3*		LESS COMMON	SOMEWHAT COMMON
MicroStrategy MicroStrategy Analytics Platform (n=6)	76.6*		LESS COMMON	SOMEWHAT COMMON
Oracle Business Intelligence Enterprise Edition (n=6)	79.1*		LESS COMMON	COMMON
SAS SAS Analytics (n=11)	85.9*		SOMEWHAT COMMON	LESS COMMON

30.0 40.0 50.0 60.0 70.0 80.0 90.0 100.0

*Does not meet minimum KLAS Konfidence level.

BOTTOM LINES ON VENDORS

RATED VENDORS

DIMENSIONAL INSIGHT: Best overall client-reported combination of strong service and product-suite capability and performance; considered “top notch” by multiple customers.

TABLEAU: Simplicity of visual analytics seen as driving much-needed value. High satisfaction has led to noticeable market growth, even though product not considered a full BI suite.

QLIK: Creative healthcare analytics use cases and enterprise adoption among healthcare customers differentiate Qlik in visual data discovery; sees continued momentum and above average performance.

INFORMATION BUILDERS: Improving implementations over last year and continued development result in performance uptick. BI suite option seen as more affordable than largest BI vendors’, more expensive than smaller vendors’.

MICROSOFT: Improvement in client-reported performance over last year but still about average overall. Skills for vendor BI suite (i.e., SQL) are commonly found; cohesive use of the multiple products within Microsoft’s BI solution stack not as common.

IBM: Large organizations see IBM as innovating in analytics and offering broad capabilities. Aside from some very happy customers, vendor innovation and strong capability contrasted by average performance and product complexity.

MCKESSON: Overall, most customers struggle with BI suite and vendor relationship, and some see McKesson looking ahead rather than addressing current needs. New Explorer visualization product creating energy and excitement.

SAP: Support and system complexity struggles result in low performance; clients infrequently achieve strong product use and platform potential. Some satisfaction improvement in newer 4.x versions. Relationship with Epic propels considerations.

PRELIMINARY DATA VENDORS

HEALTH CATALYST: Fast-growing healthcare-specific vendor. Unique approach and maturing product bring clinical discipline and problem solving to healthcare BI. Clients often speak of short-term results and have high confidence in the vendor.

MICROSTRATEGY: Performance drop since last year—capable platform and historically better-than-average vendor support starting to be overshadowed by higher vendor pricing and difficult-to-use product.

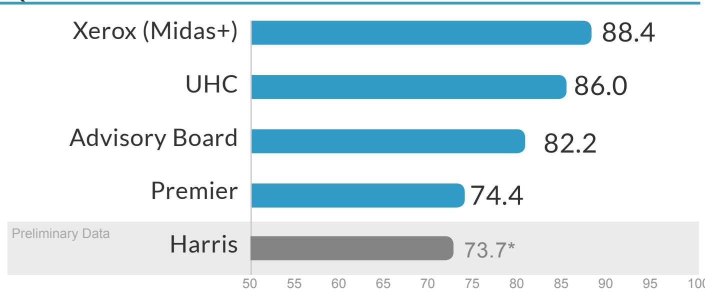
ORACLE: OBIEE seen as comprehensive to large healthcare organizations using it, but most clients see it as expensive. Oracle EHA platform gaining traction, though clients admit the need for very skilled, dedicated resources to make it work.

SAS: Vendor often recognized for advanced analytics (i.e., statistical, predictive); while use of SAS is largely concentrated among power users, strong support experience and new visualization product widen its appeal.

FOCUSED-ANALYTICS VENDORS OVERALL PERFORMANCE

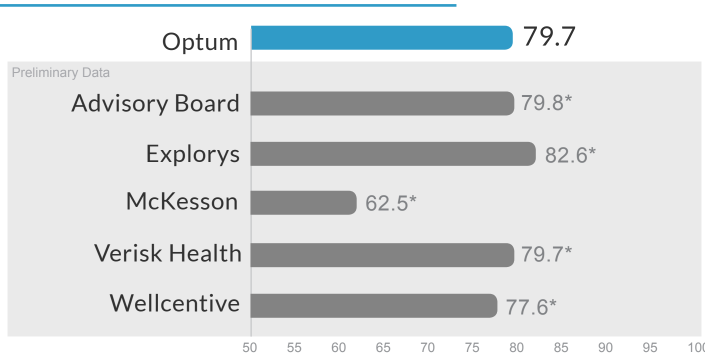
Healthcare providers often turn to focused analytics—products or solutions focused on an area or designed for a specific purpose. KLAS highlights vendor performance in multiple areas below.

QUALITY/PHYSICIAN BENCHMARKING ANALYTICS



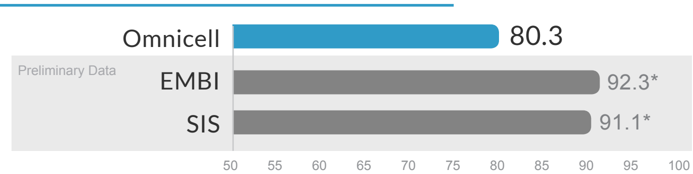
Vendors shown are those seen/validated by KLAS as primarily analytics focused. See KLAS 2014 Quality Management report for more depth and vendor reviews.

POPULATION HEALTH ANALYTICS

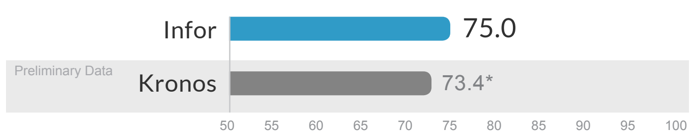


Vendors shown are those seen/validated by KLAS as primarily analytics focused. See KLAS 2014 Population Health Management report for more depth and vendor reviews, including vendors with ambulatory focus, care management focus, etc.

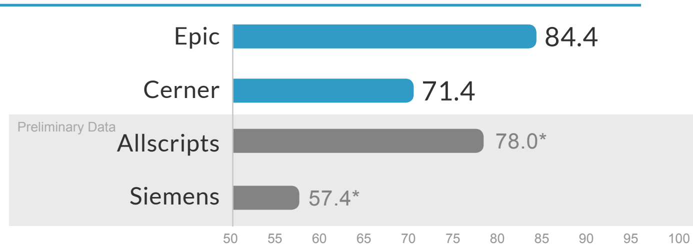
CLINICAL ANCILLARY ANALYTICS



FINANCIAL/WORKFORCE ANALYTICS



EMR-VENDOR ALIGNED/EMBEDDED ANALYTICS



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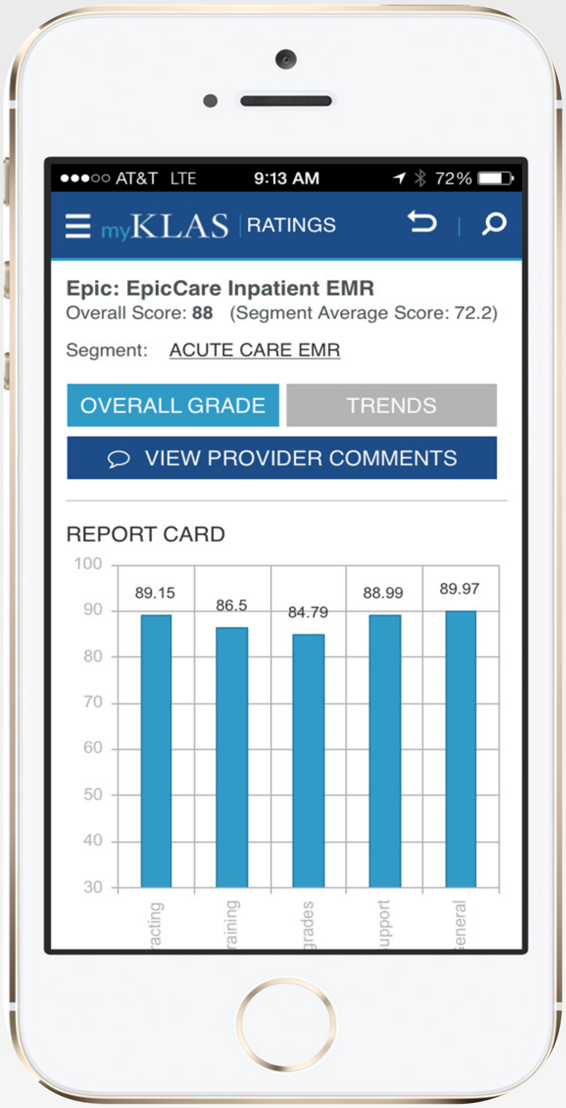

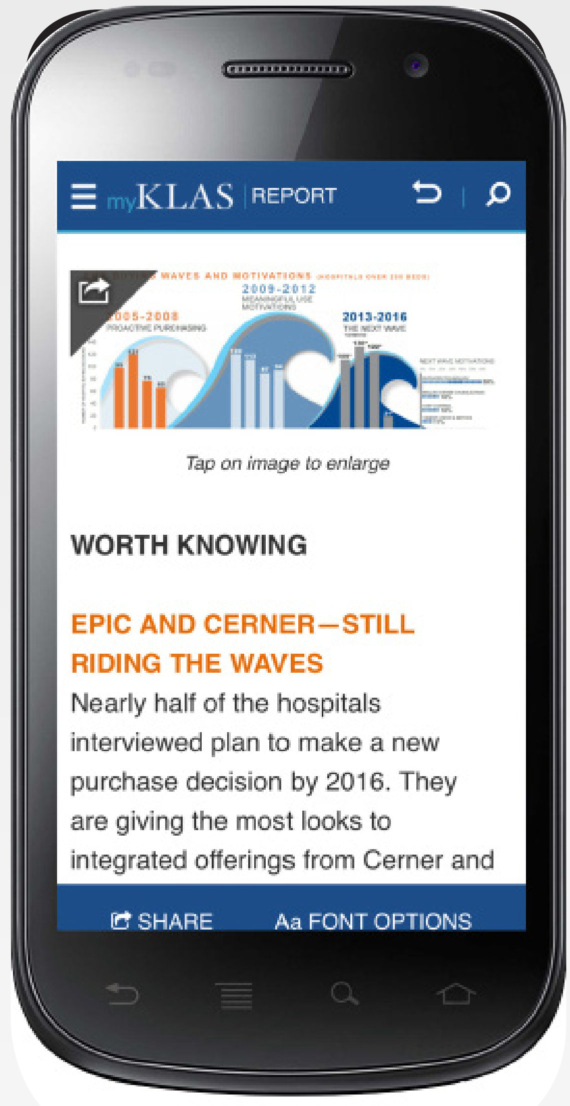

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