



Hospital Vision Study

Unmasking Complexity

Elevating Healthcare with
Strategic Supply Management



Take a deep dive into the operational hurdles at the heart of healthcare. Peel back layers of complexity to reveal the crucial balance between materials management and the imperative to deliver exceptional patient care. It's a comprehensive look at the challenges and solutions reshaping healthcare from the inside out.

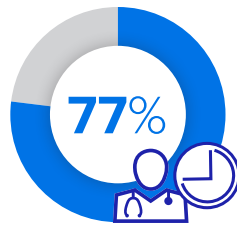
Investigate thought-provoking topics redefining healthcare efficiency.

Streamlined Supplies, Sharper Focus

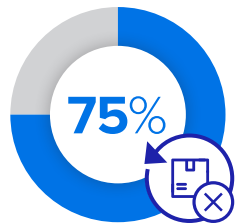
Effective inventory management anchors seamless healthcare delivery, safeguarding patient safety and care continuity. With a strategic focus on system enhancements, healthcare leaders are mitigating supply disruptions, ensuring clinicians can prioritize patient care. These advancements in inventory precision underscore a collaborative effort to elevate clinical efficiency and patient outcomes.

The Not So Silent Struggles

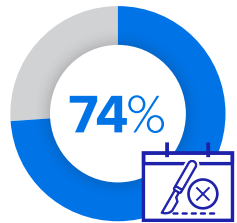
Percentage of decision-makers agree



Clinical staff at my organization spend too much time locating the medical equipment, materials and/or supplies when needed



Recovering 100% of recalled or expired items or supplies they directly oversee is a challenge



Cancellations of procedures or surgeries due to out-of-stock/low-stock/lost supplies are a significant problem for my organization

Top Five Obstacles Impacting Inventory and Materials Management

Decision-makers rank obstacles

1



Outdated Enterprise Resource Planning (ERP) System

2



Lack of Electronic Data Interchange (EDI) with suppliers

3



Disparate systems to manage various types of assets and supplies

4



Maintaining manual spreadsheets

5



Lack of integration between offsite storage/warehousing facilities and main hospital(s)

Clinical Decision-Makers Speak Out

“When shortages happen, there is an impact on patient care, there is an impact on patient satisfaction and there is an impact on patient health.”

Hospital Chief Pharmacist, United Kingdom



“You have certain wounds that you want to treat with very specific treatments and supplies. If those aren’t available to you, that’s going to affect the outcome of that patient. You can substitute with other things, but they’re not as effective as that planned treatment for that patient.”

Hospital Chief Nursing Officer, United States

Optimizing Healthcare Inventory: A Strategic Imperative

The journey toward enhanced inventory management in healthcare is a progressive but complex climb. Within the hospital, inventory is a wide-ranging term encompassing everything from high-use consumables like syringes and swabs to more costly items such as implants and surgical kits, which are kept in shorter supply. Managing these diverse inventory requirements is a complex task shared across clinical and non-clinical staff and shaped by the needs of each hospital location.

Key areas like pharmacies and clinical storerooms stand out as critical departments where improvements can drive significant impact, underscoring the ongoing efforts to refine inventory management for better patient outcomes. The stakes are exceptionally high in operating rooms and theaters where clinical decision-makers report intense pressure to deliver on inventory needs to preserve a positive relationship with surgical staff and ensure patient safety and satisfaction.

Streamlining Surgical Supplies

The stakes are exceptionally high in operating rooms, where clinical decision-makers grapple with managing inventory to keep surgical staff relations positive and ensure patient safety. A U.S. hospital chief nursing officer highlights the depth of these challenges: “[The] OR is a huge source of [materials management] issues,” she observes. “Making sure we have equipment and supplies that are not outdated, ... keeping track of where those supplies are going and [ensuring] we are getting reimbursed appropriately [is crucial].” The nursing officer’s insights spotlight the intricate balance required in materials management and its pivotal role in healthcare delivery.

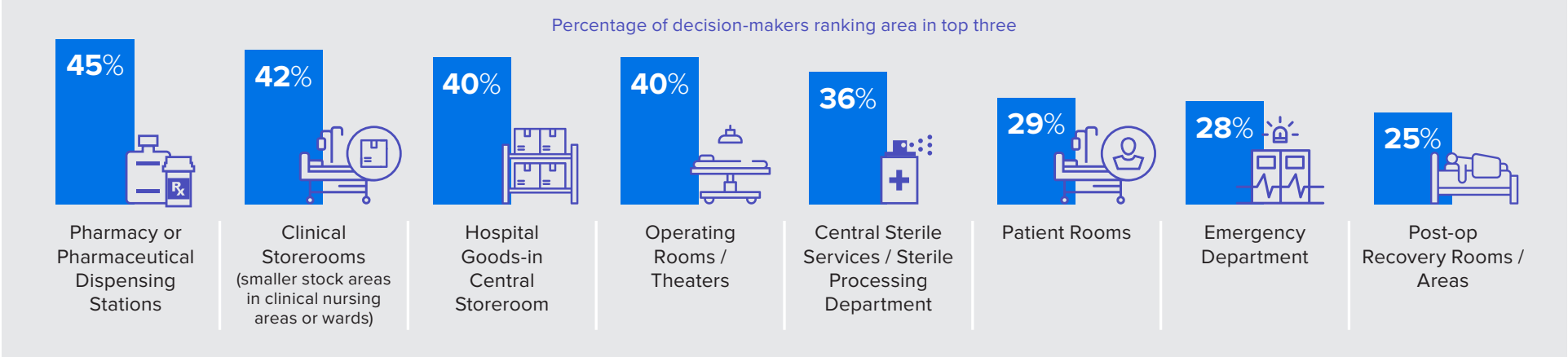
Inventory Vigilance: The Keystone of Patient Safety

Percentage of decision-makers



Inventory Status Check: Spotlight on Hospital Areas in Most Need of Process Improvement

Percentage of decision-makers ranking area in top three



Confronting Inventory Inefficiencies

In the day-to-day hospital operations, staff confront significant barriers to maintaining inventory accuracy.

The traditional method of manual inventory cycle counting demands considerable time and is prone to human errors that can directly impact the efficiency of nursing staff and, ultimately, the delivery of patient care.

This reliance on manual processes means that inventory levels are not updated in real time and often do not reflect the reality of current conditions. Clinicians searching for consumable supplies, ranging from wound dressings and surgical tools to blood pressure monitors and IV bags, may not find them in the expected quantity or location. Lack of real-time visibility hinders the critical process of order fulfillment and replenishment, which can lead to delays in patient treatment. Addressing these issues is vital to advancing healthcare operations and ensuring optimal patient care remains the top priority.

The Cost of Oversight

The implications of these manual systems and their associated challenges are encapsulated by a U.S. hospital chief nursing officer's experience: "Every now and again, we'll find a whole case of something that has expired that should have been pulled and moved to the front a while back, but because of workforce shortages and people not paying attention, that happens and there's no tickler that alarms them." This candid admission sheds light on the consequences of current practices and underscores the urgency for more effective inventory management solutions.



Visibility, Validity and Variation: The Triple 'V' Dilemma in Healthcare Inventory Management

Nearly one-fourth of decision-makers rank the following areas as leading obstacles impacting inventory management

- Lack of real-time visibility of the location of assets and inventory
- Lack of consistent facility-wide inventory cycle counting
- Lack of documented inventory management processes

Inventory in the Balance: Tackling Healthcare's Workflow Woes

Percentage of decision-makers identifying challenges to inventory accuracy



39%
Manual inventory cycle counting in clinical storeroom areas or wards



39%
Real-time recording of supplies and equipment used in surgical theaters/operating rooms



37%
Order fulfillment or replenishment in hospital goods-in central storeroom



37%
Manual inventory cycle counting in hospital goods-in central storeroom



36%
Stocking or restocking clinical area storerooms
(electronically recording item, quantity and location at time of delivery)

The Digital Shift in Inventory Management

Easing the Burden on Nurses

“Scanning and charging of materials is incredibly cumbersome. When we look at the efficiencies of nursing practice and the efficiencies on the floor, the technology in this space feels like it just has a huge opportunity.”

Chief Nurse,
U.S. Health System

As healthcare institutions navigate the complexities of modern medicine, the push for digitalization is clear. Clinical and non-clinical decision-makers alike recognize the opportunity to revolutionize the healthcare landscape with automated inventory management systems at the point of care.

The shift to digital inventory management is setting a new standard for operational excellence, streamlining communications and ensuring that essential medical assets and inventory are precisely where they need to be when they need to be there. Integrating innovative technologies facilitates predictive analytics, optimizing procurement processes and reducing costs. This transformative leap ensures healthcare institutions are equipped to meet evolving demands, promising a healthcare experience marked by precision, safety and efficiency, ultimately benefiting both providers and patients.

Inventive Inventory: A Nurse’s Call for Digital Upgrade

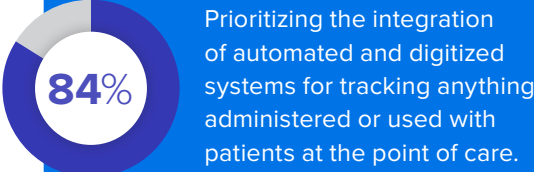
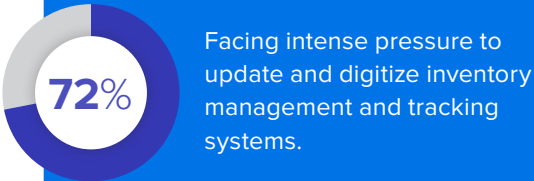
The urgency of implementing such advanced systems is echoed by a U.S. health system’s chief nurse, who stresses the importance of evolving beyond current practices: “We need to go past that thought process of ‘we are not only scanning to charge the item, we’re scanning so that we can keep the inventory up.’ There’s got to be a better system

out there, but we don’t have it enforced here.” This sentiment underscores the gap between the potential of digital solutions and their practical application, emphasizing the need for institutions to embrace these technologies fully.



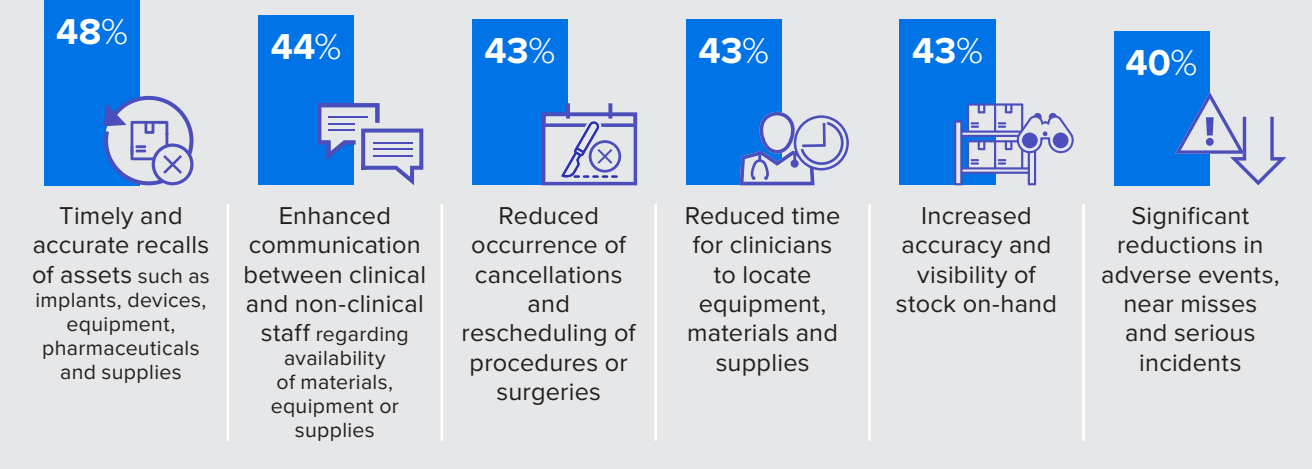
Healthcare’s Push for Next-Gen Inventory Systems

Percentage of decision-makers reporting their organization is:



Reimagining Inventory: Reaping the Digital Dividends

Percentage of decision-makers citing benefits to digitizing inventory management



Mastering Modern Healthcare Inventory Challenges

Hospitals face significant inventory challenges, including manual cycle counting inefficiencies, the need for real-time tracking and replenishment difficulties. Outdated processes and inadequate infrastructure exacerbate inventory issues further and hamper the integration of devices and technologies. However, change is on the horizon. Clinical and non-clinical decision-makers alike are laser-focused on opportunities to implement more seamless inventory management solutions and achieve overall operational efficiency in their healthcare facilities.

About the Study

Zebra commissioned Azure Knowledge Corporation to conduct an online survey among 280 non-clinical decision-makers in large hospitals (1,000+ beds) in the United States and the United Kingdom. Respondents are responsible for overseeing one or more of the following inventory categories: medical devices, durable medical equipment, implants, consumables, medical supplies, pharmaceuticals or sterile instruments.

Expert Voices: Clinical Perspectives

All direct quotes in this report were exclusively derived from comprehensive one-on-one interviews with clinical leaders in the United States and the United Kingdom, providing a unique and rich qualitative dimension to the research findings.

The study results are summarized in a three-part series:



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Healthcare's Digital Pulse
Elevating Precision in
Inventory Management



Healthcare Horizons
Navigating the Future of
Inventory Intelligence

To view the Hospital Vision Study series, visit zebra.com/hospital-materials-mgmt-vision-study

About Zebra Technologies

Zebra (NASDAQ: ZBRA) helps organizations monitor, anticipate and accelerate workflows by empowering their frontline and ensuring that everyone and everything is visible, connected and fully optimized. Our award-winning portfolio spans software to innovations in robotics, machine vision, automation and digital decisioning, all backed by a +50-year legacy in scanning, track-and-trace and mobile computing solutions. With an ecosystem of 10,000 partners across more than 100 countries, Zebra's customers include over 80% of the Fortune 500.

Discover how Zebra can help transform your hospital's materials management processes to help drive greater clinical efficiencies and safer patient care. Visit zebra.com/healthcare



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