

SECTOR GUIDE

*In partnership with*



# WELCOME TO THE DIGITAL AGE OF HEALTHCARE

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*The pace of change in the healthcare sector is accelerating faster than ever before. A growing global population with increasingly complex health challenges is putting significant strain on the healthcare sector, and with budgets squeezed and a shortage of healthcare employees at all levels, we have reached a critical point whereby we must act now to avoid a worldwide disaster.*



A massive 81% of healthcare executives say that industry boundaries are being erased and new paradigms are emerging.<sup>1</sup> So why is this?

Firstly, ageing and growing populations are putting immense pressure on healthcare systems around the world, along with a proliferation of chronic diseases which need to be managed on a case-by-case basis. Along with this, care quality and value are more closely scrutinised than ever before, with new regulations to abide by, and increasing regulatory pressure and complex compliance requirements that can literally spell the difference between life and death.

*"Spending on compliance training in high-consequence industries, such as healthcare, varies dramatically. 22.6% of these organisations spend more than \$5,000 on compliance training per employee a year, while 30.6% spend less than \$500 "*

**COMPLIANCE TRAINING 2017, BRANDON HALL**

<sup>1</sup> Accenture, 'Technology Vision 2016: People First', [techtrends.accenture.com](http://techtrends.accenture.com)





Poor salaries, expensive training and uncomfortable working conditions are also contributing to a shortage of essential medical staff. From nurses priced out of expensive degrees to junior doctors expected to work long, exhausting shifts, this is a serious challenge across the healthcare sector.

In 2017, more nurses and midwives were leaving the professions than were joining in the UK, leaving question marks over the future of Britain's hospitals and medical services – and this is a trend being replicated worldwide. With a growing skills gap that is not being

plugged with the necessary training and no time or budget to create the learning courses and resources that are vitally needed, the problem is only going to get worse.

Additionally, we are entering an age of consumer-led healthcare. Today's patients have access to comprehensive medical information at the touch of a button, and many of us research our symptoms online before we ever set foot in a doctor's office. Sometimes, patients know more about their conditions than the medical staff treating them, and the role of the doctor is changing.

Patients are becoming increasingly interested in self-management of their medical conditions, and technology is making this possible for millions of people worldwide.

All these factors are creating the perfect storm in healthcare, leading to rising costs of treating an ageing population with complex medical concerns and a need to increase spending for care provision, staffing, infrastructure improvements and innovations in medical technology.

**So what are we going to do about it?**

## FAST FACTS

**7,2 MILLION  
DOCTORS, NURSES  
AND MIDWIVES**

By 2030, there is expected to be a **global shortage of 15 million** healthcare workers.<sup>2</sup>



**20% of patients** released from American hospitals **need to be readmitted within 30 days**, costing Medicare \$17 billion a year.<sup>3</sup>

<sup>2</sup>Liu, J., Goryakin, Y., Maeda, A., Bruckner, T., Scheffler, R., 'Global Health Workforce Labor Market Projections for 2030', 2017.

<sup>3</sup>Alper, E., O'Malley, T., Greenwald, J., 'Hospital discharge and readmission', 2017.





**51%**

## **STAFF LEAVING THE UK'S NHS**

The number of **staff leaving the UK's national health service (NHS)** has risen by **51%** in just four years.<sup>4</sup>



Nearly **45,000 Americans die each year** as a direct result of being uninsured for medical care.<sup>5</sup>



**101%**

**The number of people aged 65 years and over is expected to rise by 101%** between 2000-2030 globally.<sup>6</sup>

<sup>4</sup> HR Grapevine, 'Thousands of NHS staff quit due to low pay and stress', 2017.

<sup>5</sup> The Guardian, 'Will losing health insurance mean more US deaths? Experts say yes', 2017.

<sup>6</sup> CDC, 'A Public Health Priority', 2017.

# HEALTHCARE FOR THE FEW, NOT THE MANY

In many ways, healthcare is now an international lottery. Those born in countries with free, high-quality healthcare will benefit from prolonged lifespans and better medical care, while those living in countries with unstable and expensive medical infrastructures will continue to suffer.

Even in highly developed countries such as the US, patients without sufficient medical insurance can see treatment bills spiralling into the hundreds of thousands of dollars, creating an unsustainable environment for anyone struggling with their health.

On a more local level, healthcare can be a postcode lottery if people can't afford to pay for private treatment.

Oxfam research indicates that the world's 62 richest billionaires possess as much wealth as the poorest 50% of the human population, and with poorer people more likely to suffer from chronic health problems, this means there is a huge disparity between those with wealth and those who need free healthcare the most.<sup>7</sup>



*Those who can afford to pay for increasingly expensive private medical care are benefitting from the fact that many talented public sector healthcare workers are now moving into private services for better pay and working conditions, leaving those reliant on national services in a difficult situation. This is healthcare for the few, not the many.*

<sup>7</sup>Oxfam, 2016





The fact is, we're trying. The world's major regions are expecting to see healthcare spending increases of up to 7.5% between 2015 and 2020.<sup>8</sup> However, despite spending more money on improving access to healthcare, severe infrastructure issues globally are making it difficult for public healthcare systems to sustain their current levels of service, so it is clear that something needs to change urgently.

In healthcare, the ability to keep up with innovations is crucial to the success of organisations everywhere. For instance, Hampshire County Council in the UK has saved over £4.7 million on elderly care in three years by introducing telecare services using videoconferencing technology and tablet computers,

reducing the number of visits required by carers.<sup>9</sup> Robot surgeons are also being developed, which can carry out pioneering, less invasive treatments for patients which may require less recovery time and resources, which could lead to significant cost savings in the long run.<sup>10</sup>

But this example is an exception, not the rule. Healthcare systems are notoriously bureaucratic and slow to respond to challenges, with vast amounts of industry legislation to abide by. If healthcare organisations themselves don't find a way to be more flexible and agile in the face of our changing healthcare requirements, we can expect fast-moving technology companies like Amazon, Google and Apple to swoop

in and take over. Already, Google is developing contact lenses for blood glucose monitoring in people with diabetes,<sup>11</sup> and Apple has introduced its HealthKit to facilitate the creation of apps for healthcare purposes.<sup>12</sup>

Healthcare organisations will face increasing competition from the tech giants, and could find themselves rapidly left behind in an age where consumers are keen to take control of their own care – especially when tech CEOs aren't held back by the same constraints as the heavily regulated healthcare sector.<sup>13</sup>

<sup>8</sup> Deloitte, 2016

<sup>9</sup> BBC, 2017

<sup>10</sup> Telegraph, 2015

<sup>11</sup> The Medical Futurist, 2016.

<sup>12</sup> Mashable, 2017

<sup>13</sup> CNBC, 2017

## SECURING SAFE, FAST ACCESS TO LIFE-SAVING INFORMATION

Removing barriers to access crucial medical information is also going to be essential in the coming years. Healthcare organisations' IT infrastructure must dramatically improve to make it faster and more efficient to find life-saving information, while maintaining security and patient confidentiality at all times. The recent NHS ransomware attack in the UK shows that even one of the world's largest healthcare systems was susceptible to a large-scale security breach, putting the data and care of millions of patients at risk.

## THE L&D APPROACH

L&D teams need to find smart ways to manage both user data and ensure the rapid transfer of knowledge in a sector where things can change literally overnight. The answer is not to cut corners and look for workarounds – it is to acknowledge the vital data protection laws in place around patient information and find ways to support them with the learning technology they choose. Patient confidentiality should always be a priority, so opting for secure systems and ensuring all employees are compliant when handling confidential data (and keeping a record of this information) is key.

*“44.1% of organisations in high-consequence industries do not feel thoroughly prepared for a compliance audit.”*

**COMPLIANCE TRAINING 2017, BRANDON HALL**





## **INVEST IN EFFICIENCY-BOOSTING MEDICAL TECHNOLOGY**

Along with the infrastructure aspect of healthcare technology, there is also medical technology to consider. Evolving IT infrastructure and medical technology go hand in hand, with greater integration between the devices people use to manage their care and the systems used by healthcare providers.

For instance, diabetic patients can monitor their blood glucose levels and send instant reports to their care team, ensuring they can keep an eye on trends with minimal intervention, and counselling sessions can take place using video conferencing software to minimise travel time and disruption for patients.

## **THE L&D APPROACH**

It's no good giving patients to life-changing technology if healthcare professionals can't keep up. L&D teams need to be equipped with flexible learning solutions for more efficient learning. For instance, enabling SMEs to upload content to an LMS themselves or supporting social learning can be invaluable when it comes to helping learners stay informed and ahead of the game.

## **GIVE POWER TO THE PEOPLE**

The consumerisation of healthcare is massively disruptive for a sector so focused on the expert-patient relationship. However, in a world where access to good-quality healthcare is only going to increase in the future, the most effective approach could well be to continue down this path. More self-diagnosis, more self-management and less time spent using valuable healthcare resources could help ensure that resources are allocated more efficiently in the long run.

For instance, many people already use online symptom checkers to get an idea of what might be wrong with them, going through the same series of diagnostic questions they would be asked in person by a doctor. Moving more of this online would help relieve some of the pressure on doctors, especially for minor, routine cases, and give people easier and faster access to treatment if required.

## **THE L&D APPROACH**

Giving power to the people should be about more than just patients. In order to stay agile and on top of the latest developments, healthcare professionals must be empowered to take charge of their own learning. Whether this means accessing performance support resources on their phones, receiving push notifications about new courses or double-checking complex information in the middle of a night shift, empowering healthcare workers to take charge of their own learning will only improve the care they give to patients.



# MEDICAL CARE IN THE NEW LEARNING WORLD

Learning is a catalyst for change, and we are now operating in the new learning world. [Sectors such as healthcare](#) will benefit immensely from this new approach to learning, with a shift away from just-in-case, reactive learning and towards a proactive, always-learning model.

This is particularly important for healthcare professionals who generally have very limited time for formal learning, yet still need to keep up with the latest medical research, processes and regulations.



# OLD LEARNING WORLD

## JUST-IN-CASE

Healthcare is a hugely knowledge-intensive sector, with employees needing to accurately remember vast amounts of life-saving information. Memorising everything upfront is virtually impossible, and not a sensible use of time.

## REACTIVE

Waiting to react to new skills or knowledge can spell the difference between life and death. For emergency medical staff, not staying up to date with the latest procedures, infections and diseases can be literally life threatening.

## GENERIC

In a highly specialised sector such as healthcare, generic content is not enough. Generic learning doesn't allow for the highly specific way in which healthcare staff need to work.

# NEW LEARNING WORLD

## JUST-IN-TIME

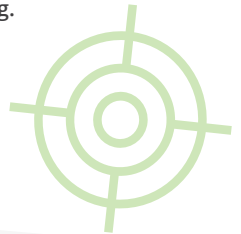
Giving healthcare workers the information they require at the point of need can help them deliver the right care at the right time.

## PROACTIVE

Medical employees need to keep their finger on the pulse at all times to ensure they are always prepared for the next emergency. A proactive approach to learning will help workers deliver better care no matter what challenges arise.

## DIFFERENTIATED

Different hospitals, surgeries and clinics have different requirements, and every single patient should be treated as an individual, requiring more flexible, tailored learning.





## PROPRIETARY

Opting for proprietary systems often puts too much pressure on stretched healthcare budgets, and leaves organisations locked into systems which may not serve their needs effectively as their requirements change over time.

## VENDOR IN CONTROL

In a sector as important as healthcare, your vendor being in control of your systems is a serious constraint. If you need a new feature or new functionality, you will be reliant on your vendor's roadmap and timeframes, with no power to solve the challenge yourself.

## INVEST AND STAGNATE

Unfortunately, too many healthcare organisations pump significant amounts of money into systems that don't support their growth over time. They end up spending a fortune on expensive systems which end up slowing them down or causing more problems further down the line when they can't respond fast enough to urgent challenges.

## OPEN

Different hospitals, surgeries and clinics have different requirements, and every single patient should be treated as an individual, requiring more flexible, tailored learning.

## YOU ARE IN CONTROL

The best option for rapidly evolving healthcare organisations is to opt for systems that put them in the driving seat. Rolling out new devices and need to upgrade your systems? No problem. Merging with another hospital and need to double your capacity? Easy.

## INVEST AND ADAPT

Investing in systems which adapt to your needs is the smartest option for healthcare organisations. As health and patient needs change over time, so too must the way people learn. Invest in a flexible, scalable, adaptable system which changes to suit your needs, not the other way round, to ensure you consistently deliver a high standard of care in changing times.

# HOW ARE HEALTHCARE ORGANISATIONS MANAGING LEARNING TODAY?

The coming years will be critical for the healthcare sector, as we reach a tipping point in terms of budget and resources. L&D will play a fundamental role in two ways: firstly, helping to keep **costs** on essential training down, and secondly, by ensuring that every single patient receives the standard of care they require.

*"Over a third of employees in high-consequence industries only participate in compliance training once a year, meaning that when they do it, it really needs to count."*

COMPLIANCE TRAINING 2017, BRANDON HALL



Open learning platforms such as [Totara Learn](#) are key to the future success of the healthcare sector. Healthcare organisations around the world are choosing Totara Learn to deliver learning and manage content, employees and performance.

Opting for Totara Learn helps healthcare organisations everywhere save time, money and resources, as well as giving them the freedom to take control of their own learning. It is only by taking this approach that our hospitals, surgeries, clinics and care services can thrive in the long run.

The power of open source software for learning really does speak for itself. Dozens of organisations in the healthcare sector have already shared their Totara success stories, and we've put together some of the key achievements from across the global Totara network to demonstrate how organisations like yours are making a measurable difference with Totara Learn.



**AVERAGE**  
**COST: £230,000**

Traditional methods of healthcare training are increasingly costly.  
**It costs more than £230,000 on average to train a doctor.<sup>13</sup>**

<sup>13</sup> YouGov, 'Homegrown doctors', 2017.



**>300,000**  
**COMPLETED**  
**COURSES**

Over 300,000 courses have been completed with Region Zealand's open source healthcare learning platform.<sup>14</sup>

<sup>14</sup> Region Zealand Case Study, 2017.

<sup>15</sup> Counties Manukau District Health Board (CMDHB) Case Study, 2016.

<sup>16</sup> UK National Health Service (NHS) Case Study, 2017.



**SAVING**  
**\$270,000**

Ko Awatea and Counties Manukau District Health Board in New Zealand **save up to \$270,000 USD a year.**<sup>15</sup>



**100%**

**100% of surveyed NHS L&D professionals throughout the UK said that targeting training is easier in Totara Learn than in legacy systems.**<sup>16</sup>







**£250,000**  
**SAVED**

East Lancashire Hospitals  
in the UK **saved more**  
**than £250,000** on  
portfolio building.<sup>17</sup>



**458%**  
**INCREASE**

Headspace Australia  
increased **learner**  
**engagement by 458%**.<sup>18</sup>



**50,000**  
**MEMBERS**

American Society of  
Anesthesiologists  
**delivers training to 50,000**  
**members** across the US.<sup>19</sup>

<sup>17</sup> East Lancashire Hospitals Case Study, 2015.

<sup>18</sup> Headspace Case Study, 2017.

<sup>19</sup> American Society of Anesthesiologists  
(ASA) Case Study, 2016.



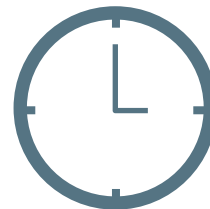
## **SAVING** **£800,000 A YEAR**

UK's largest private healthcare provider, BMI Healthcare increased compliance by 133% and **saves £800,000 a year**.<sup>20</sup>



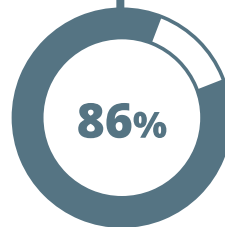
## **£600,000 A YEAR**

British Dental Association makes **around £600,000 a year** by using their Totara Learn platform to sell courses.<sup>21</sup>



## **SAVING** **3,000 HOURS**

Eastern Health **saves 3,000 hours of training time** for Australian student nurses a year.<sup>23</sup>



## **ENGAGED**

Virgin Care in the UK **engaged 86% of employees in the first 20 weeks** since launch.<sup>22</sup>

<sup>20</sup> BMI Healthcare Case Study, 2015.

<sup>21</sup> British Dental Association Case Study, 2015.

<sup>22</sup> Virgin Care Case Study, 2016.

<sup>23</sup> Eastern Health Case Study, 2016.





# 95%

## COMPLETION RATE

Austin Health's **pre-onboarding training** has a **completion rate of 95%**, saving two hours of onboarding time per intern in Melbourne.<sup>24</sup>



## IMPROVES AVERAGE EXAM SCORES

National Ambulance UAE **improves average exam scores from 75% to 92%**, and health and safety training compliance is now at 98%.<sup>26</sup>



## SAVING \$300,000

American corporation Charles River saves almost **\$300,000 USD** and **1,000 learning administration hours** in a year.<sup>25</sup>



## IN JUST 10 WEEKS

Sussex Partnership UK NHS Foundation Trust went live with their new Totara Learn platform **in just 10 weeks**.<sup>27</sup>

<sup>24</sup> Austin Health Case Study, 2017.

<sup>25</sup> Charles River Case Study, 2017.

<sup>26</sup> National Ambulance UAE Case Study, 2017.

<sup>27</sup> Sussex Partnership NHS Foundation Trust Case Study, 2015.

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## ABOUT HUBKEN GROUP

Leading UK e-learning experts, Hubken Group have been successfully solving e-learning challenges since 2004.

We provide transformative e-learning solutions to [organisations large and small](#), from household names to SMEs.

We'll get you set-up, provide hosting and unlimited support as standard and offer a range of optional, [value-add services](#). Achieve your online learning goals with Hubken's e-learning solutions.

### A Hubken Solution delivers...

- **Power and flexibility** - shaped to meet your goals
- **Services you need** - hosting, content, branding and more
- **Real value** - delivering what you need for less
- **Assurance** - leaders in e-learning success since 2004
- **Transparency** - expect honesty, friendliness and openness
- **Ongoing support** - we're there whenever you need us

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