



Connected Care: Transforming Healthcare Communication for Better Outcomes

FROST & SULLIVAN VBOOK

The contents of these pages are copyright © Frost & Sullivan. All rights reserved.

[frost.com](https://www.frost.com)



The Hidden Costs of Disconnected Communication in Healthcare

Hospitals and healthcare systems are navigating a perfect storm of challenges: workforce shortages and burnout, rising costs, persistent health inequities, data security concerns, and the growing demands of an aging population with complex health needs. Each issue is significant on its own, but together, they create a high-pressure environment that demands smarter, more connected solutions.

To meet these challenges, healthcare providers must adopt technologies that empower decision-making and streamline operations. Central to this is communication; telecommunications are the backbone of coordination and collaboration, both within organizations and across the broader care ecosystem.

The consequences of not addressing these challenges are severe, including delayed care, overwhelmed staff, and compromised quality of care.

Communication breakdowns are not just operational inefficiencies; they're barriers to safe, effective care.

The following Frost & Sullivan data shows that communication complexity is a major barrier in healthcare, and solving it requires a unified, role-specific, and integrated approach.

Burden of too many communication tools

66%

Lack appropriate tools for specific roles

64%

Healthcare employees' resistance to new communication tools

63%

Insufficient technology training

62%

Downtime due to connectivity issues

62%

Poor integration with other systems

62%

Absence of automated event notifications

59%



Workflow Breakdown: How Communication Gaps Disrupt Care

Coordinating patient care across diverse teams and departments is complex. With so many professionals involved—clinicians, nurses, administrators, and support staff—miscommunications can have serious consequences, such as compromised patient safety, medication errors, prolonged hospital stays, and increased staff dissatisfaction and turnover.

Fragmented workflows and siloed systems compound the complexity of care delivery. By transforming their communication strategies, healthcare organizations can dramatically improve their workflows and the coordination of patient care, from admission to discharge.



On average, 3 in 5 healthcare IT decision-maker are prioritizing investments in workflows that directly empower healthcare professionals.

Nursing and inpatient care workflows



Administrative and financial workflows



Public health and preventive care workflows



Clinical and medical workflows



Surgical and procedural workflows





Connected Care in Motion: Optimizing Workflows from Crisis to Continuity

The initial moments in emergency and critical care workflows are pivotal; they lay the foundation for swift assessment, accurate diagnosis, and timely interventions that can save lives. These early actions not only drive better clinical outcomes but also have a direct impact on operational efficiency, patient throughput, and overall care experience.

Forward-looking healthcare organizations recognize that investing in prevention and continuity of care is essential to reducing avoidable emergency visits and improving chronic disease management. Achieving this shift requires reimagining workflows with technology that enhances coordination, accelerates response times, and supports seamless communication, such as mass notification platforms, mobile collaboration tools, and secure cloud-based paging systems.

There is a growing consensus that optimizing workflows through integrated communication and collaboration tools is essential for operational efficiency and for delivering safer, more connected care.

A considerable percentage of healthcare IT decision-makers are prioritizing investments in the following communications tools that directly empower healthcare professionals.



Prioritizing improvements in emergency and critical care workflows, recognizing their impact on outcomes and system efficiency.



Targeting nursing and inpatient care workflows, which are central to day-to-day operations and patient satisfaction.



Investing in public health and preventive care workflows, aiming to reduce acute care demand through proactive population health strategies.



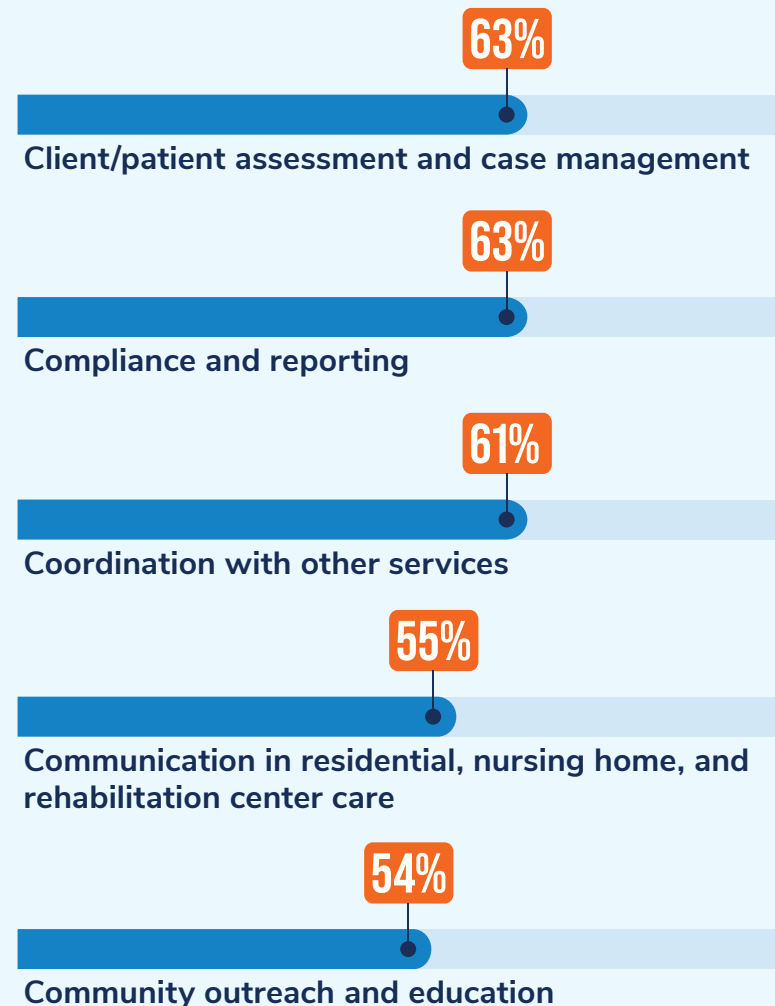
Extending Communication Beyond Hospital Walls

Timely communication is just as critical in residential and post-acute care settings as it is in hospitals. It lays the foundation for patient safety, effective care delivery, and a positive patient experience. A strong start, where needs are identified early and interventions are well-coordinated, can minimize harm, build trust, and set a trajectory for better outcomes.

As care models increasingly shift toward home health and community-based services, communications systems must evolve to support secure, seamless collaboration across hospitals, outpatient facilities, residential centers, community services, and even patients' families.

These priorities reflect a growing understanding: communication is not just a support function, it's a strategic enabler of safer, more efficient, and more equitable care across the continuum.

Frost & Sullivan data shows that healthcare IT decision-makers are planning to invest in digital communications tools to improve the efficiency of the following workflows:





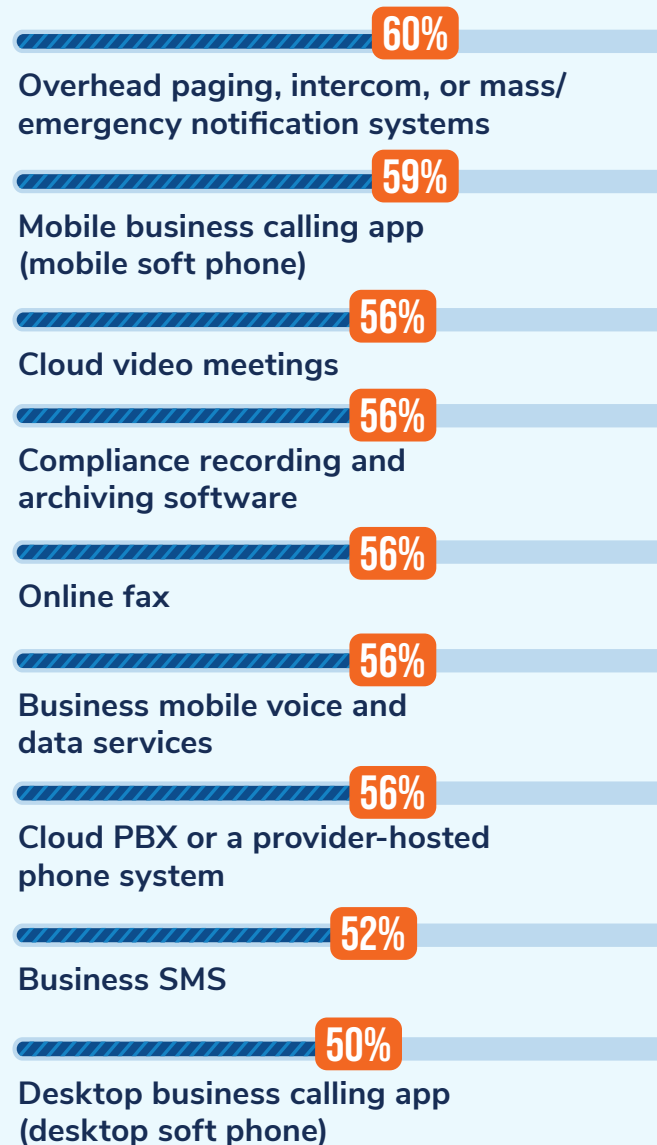
Fragmented Tools, Fragmented Care: The Case for Integration

One of the most pressing workflow challenges in healthcare stems from fragmented communication technologies. While organizations rely on a wide array of tools for collaboration, this diversity often introduces complexity rather than clarity. Many clinicians are still working with legacy systems that are increasingly incompatible with modern digital healthcare solutions, such as telehealth platforms, mobile apps, and wearable technologies, ultimately hindering care coordination and operational efficiency.

To overcome these barriers, healthcare providers must be equipped with advanced, intuitive telecom solutions that unify communication channels. Doing so resolves fragmentation, enhances staff engagement, streamlines workflows, and fosters a more agile, responsive care environment.



Over half of all IT decision-makers plan to increase investment or start using the following solutions by 2028.





Scaling Smart: Building Resilient Communication Infrastructure

Modernizing healthcare communication systems is not easy, especially with fluctuating demand and the need to integrate with clinical systems such as electronic health records. Ensuring network stability is critical because downtime directly impacts patient care and safety, making redundancy, real-time monitoring, and quality of service essential.

At the same time, healthcare IT teams are under significant strain. They're tasked with managing cloud migrations while navigating skill shortages, particularly in emerging areas such as AI and telecom. Privacy and compliance pressures remain constant, with robust security, encryption, and audit capabilities essential to maintaining trust and regulatory alignment.

These challenges highlight the urgent need for resilient, scalable, and secure communication platforms. These solutions must support clinical workflows today while providing a foundation for future innovation.

Healthcare IT decision-makers report that scalability (66%) and reliability (66%) are their top concerns, meaning current systems cannot adapt easily to growing demands.

Scalability of our existing solutions

66%

Ensuring network stability/reliability

66%

Managing the migration of our communications capabilities to the cloud

65%

IT/telecom skills shortage, including AI skills

63%

Dealing with privacy/compliance concerns

62%



Hybrid Cloud in Healthcare: Flexibility Meets Control

Hybrid cloud strategies are transforming how institutions balance innovation with the need for operational stability. By combining the scalability and flexibility of cloud solutions with the security and governance of on-premises infrastructure, hospitals and health systems can modernize their operations, safeguard protected health information, and optimize both clinical workflows and administrative processes.

This approach supports efficient growth while mitigating key risks, including vendor lock-in, data migration complexities, and potential service interruptions. Ultimately, a well-designed hybrid cloud environment helps ensure that technology infrastructure enhances care delivery, strengthens compliance with regulatory standards, and supports long-term institutional performance.

Establishing reliable, integrated communication across hybrid environments is no longer a strategic advantage but a core requirement for operational efficiency, clinical effectiveness, and patient safety.

Hybrid communication models will remain dominant through 2028, but integration is declining as non-integrated hybrid setups grow over the next 3 years.

Entirely premises-based

0% || 0%

Predominantly premises-based

2% || 4%

Hybrid, with almost equal proportions of disparate (non-integrated) premises-based and cloud solutions

22% || 18%

Hybrid, with almost equal proportions of integrated premises-based and cloud solutions

40% || 43%

Predominantly cloud-based

18% || 20%

Entirely cloud-based

17% || 14%

Hard to say

0% || 0%

Telephony environment: ■ 2025 ■ 2028 (n=98)



Strategic Investment in Communication: A Healthcare Imperative

In today's healthcare environment, communication technologies have evolved beyond being merely operational tools; they have become strategic enablers of care delivery. As telehealth adoption accelerates, hybrid work models become the norm, and AI-driven care coordination gains traction, the role of communication infrastructure will shift from supporting day-to-day tasks to enabling long-term transformation.

For healthcare IT leaders, decisions about communications budgets are no longer just cost considerations. Choosing to maintain or expand these investments reflects a deeper understanding: reliable, secure, and scalable systems are the backbone of both clinical workflows and the broader digital modernization efforts that will define the future of care.



9-in-10 healthcare IT decision makers are planning to invest in digital communications tools to improve the efficiency of workflows within the following departments in the next three years.



IT and
Telecommunications
Management

95%



Human Resources

94%



Marketing

93%



Accounting and
Finance

92%



Legal

91%



Managed Services: Simplifying Complexity, Supporting Care

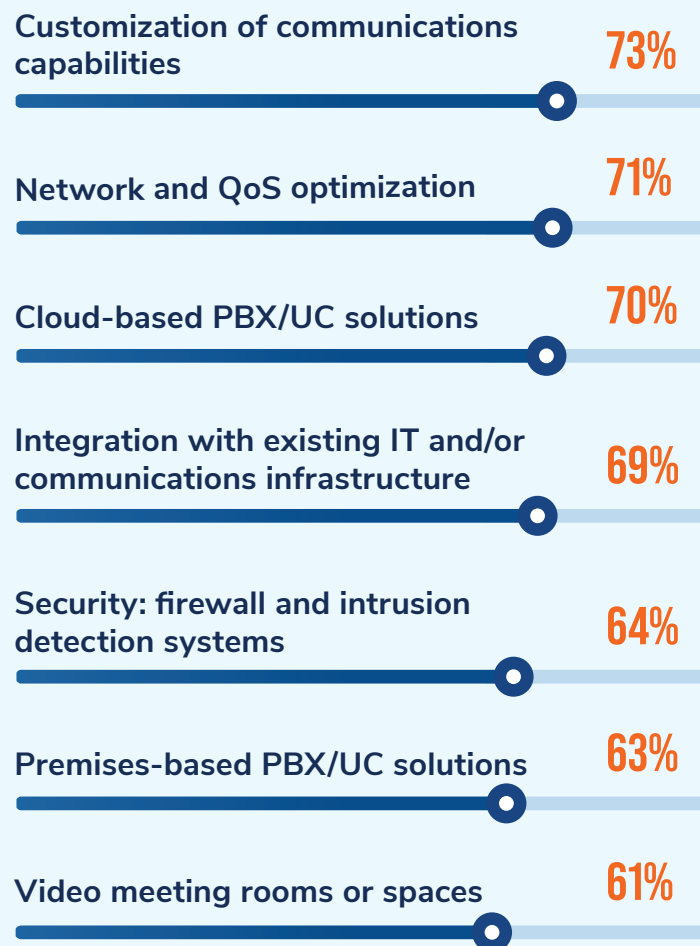
The increasing complexity of IT and communications systems across doctors' surgeries, operating theatres, hospital wards, and community care settings is placing growing pressure on healthcare organizations. These institutions must deliver high-quality patient care while managing limited budgets and resources.

Managed services offer a strategic solution, helping institutions simplify technology management, control costs, and address IT skill shortages.

While providing flexible services, expert providers deliver ongoing support, proactive monitoring, and system optimization, reducing the burden on in-house IT teams and allowing healthcare practitioners and administrators to focus on high-impact activities that advance patient outcomes.



With over 70% of IT decision-makers expecting to use managed services for customization, network optimization, and cloud PBX, these solutions are essential to simplify complexity, close skill gaps, and ensure secure, reliable communications





Choosing the Right Partner for Scalable, Secure Transformation

Selecting the right partner is essential for driving a successful communications transformation in healthcare. With increasing pressure to modernize infrastructure, reduce complexity, and improve patient outcomes, organizations need solutions that are secure, reliable, and straightforward to manage, while fully aligned with clinical workflows and operational goals.

By partnering with providers who understand the unique challenges of healthcare, organizations can deploy communication and collaboration tools that enhance staff efficiency, support patient care, and strengthen data protection. The right partner helps minimize risk, streamline ongoing management, and ensure that technology serves as an enabler rather than an obstacle to delivering high-quality care.



9-in-10 healthcare IT decision-makers view the following factors as important when purchasing communications and collaboration infrastructure.





Mitel in Practice: Powering Healthcare Communication Transformation

<p>Integration chaos is the biggest challenge, requiring a platform approach that connects existing systems. Primary care should unify communication tools to reduce administrative burden, while secondary care should ensure interoperability to break down departmental silos.</p>	<p>Mitel's hybrid architecture and deep integration capabilities help unify disjointed environments without creating new silos.</p>
<p>Hybrid communications setups are common, yet many organizations' workflows remain disjointed. Primary care providers can enhance workflows by integrating cloud-based collaboration with on-premises systems. Secondary care providers can simplify IT by consolidating legacy systems into a unified hybrid communications platform.</p>	<p>Mitel supports intentional hybrid strategies that balance on-premises control with cloud agility, improving operational continuity and regulatory compliance.</p>
<p>Workflow disruptions create opportunities for targeted improvements. Primary care providers should address key bottlenecks by enhancing inter-team communication. Secondary care providers should prioritize high-impact areas to deliver quick wins and build momentum.</p>	<p>Mitel enables workflow-specific enhancements through solutions tailored to the needs of clinical, operational, and support departments.</p>
<p>Amid staffing shortages and IT burnout, healthcare leaders need operational support. Primary care providers can reduce administrative burden by outsourcing IT management. Secondary care providers can leverage managed services to ensure uptime and ease pressure on internal IT teams.</p>	<p>Mitel's managed services extend healthcare teams' capacity, delivering reliability, upgrades, and monitoring without adding internal burdens.</p>

Mitel helps healthcare providers move beyond basic connectivity by enabling intelligent, optimized workflows that eliminate inefficiencies and improve responsiveness.

Through integrated platforms and managed services, Mitel empowers institutions to close operational gaps and deliver more consistent, patient-centered experiences.

YOUR TRANSFORMATIONAL GROWTH JOURNEY STARTS HERE

Frost & Sullivan's Growth Pipeline Engine, transformational strategies and best-practice models drive the generation, evaluation, and implementation of powerful growth opportunities.

Is your company prepared to survive and thrive through the coming transformation?

Join the journey. 

FROST  SULLIVAN