

## RSNA 2010

# Emerging Trends

Industry veterans give their perspective on pressing issues and trends in medical imaging, based on this year's main trade event

By Jeanne-Marie Phillips, president, HealthFlash Marketing Communications

**T**he annual meeting of the Radiological Society of North America is undeniably the major radiology industry event each year. With the 2010 show now over, this edition of the Focal Point Q&A with industry veterans takes a look at where the radiology field is going, based on trends seen at RSNA. We also take a look back to see how the event has evolved, as the first decade of the new millennium draws to a close.

### 1. What were the most notable trends at RSNA 2010 in your arena or at the event overall?

**Arman Sharafshahi, president, Accelarad:**

I think there were four trends that stood out as the most relevant and with the greatest potential impact over the coming years: Sharing of imaging and associated data, cloud-based computing and storage, access via mobile devices and radiation dose reduction.

**Peter Reimer, Ph.D., vice president of global marketing, imaging systems, Philips Healthcare:**

We recently surveyed 3,000 radiologists worldwide and learned that image quality was not their number one concern. Instead, they expressed the need to do more with less and asked for integration of information from various sources to make a confident diagnosis, as well as the ability to more easily collaborate with their clinical partners. Given this, it wasn't surprising to see a number of new technologies on display at this year's RSNA focused on collaboration and improving workflow.

In addition, we saw advancements

in imaging technologies, including the first-ever digital broadband magnetic resonance imaging (MRI) system and a new hybrid imaging modality in positron emission tomography (PET)/MRI.

**Stuart Gardner, president, SG&A Consulting Inc.:**

In my arena, I was impressed with the increasing popularity of the vendor-neutral archive (VNA). Its very presence continues to highlight the increasing dominance of the IT vendors over their clients, and at the same time highlights the naiveté of the customer base about what it takes to pursue a fully integrated environment.

### Q&A Participants:

**Arman Sharafshahi, president, Accelarad**

**Peter Reimer Ph.D., vice president of global marketing, imaging systems, Philips Healthcare**

**Stuart Gardner, president, SG&A Consulting Inc.**

**Julie Holodak, senior manager, medical marketing, Sony Electronics**

**John Danahy, general manager, Americas, Visage Imaging Inc.**

The big IT vendors continue to attempt to convince their customer base of a "single-vendor" solution vs. "best-of-breed" solution. We have industry standards for a reason. If most of the IT vendors provided a "fully integrated" single-vendor solution that

was organically (internally) developed, they may have a point. However, none developed all of their own applications. Instead, they have purchased many via acquisition. So, why should anyone purchase a VNA from a picture archiving and communications systems (PACS) vendor?

**Julie Holodak, senior manager, medical marketing, Sony Electronics:**

Since I am interested in trends in mammography, I think what stood out were all of the advancements in technology to improve the detection, care and treatment of breast cancer. It was quite apparent that manufacturers are moving quickly to bring new products to address this disease that affects so many people today. It was great to see these trends, not just from a technology standpoint, but being driven by a tremendous amount of passion.

**John Danahy, general manager, Americas, Visage Imaging Inc.:**

With the mandate for electronic medical records (EMR) technology gaining significant traction in the hospital provider market, the need to add imaging to an electronic conduit between care collaborators to improve patient care is also taking hold. Enterprise "universal" viewing platforms that provide ubiquitous access to all image data, including thin-slice visualization via advanced clinical 3-D, are in high demand. Thin-client applications using Web streaming and server-side rendering that provide the required performance, scalability, functionality and cost-effectiveness represent the future of diagnostic and

clinical imaging workflow.

These same technologies are in high demand by radiology physician groups to empower progressive diagnostic teleradiology business opportunities, facilitating their expansion into new referring communities that would otherwise be geographically impossible. As the provider market contracts through consolidation in all areas, the technology that improves accessibility while reducing operating expense will see rapid adoption.

## 2. How is your company addressing these trends?

**Sharafshahi:** With our flagship product, SeeMyRadiology.com, we are positioned to address the four top trends I listed. We developed a true cloud computing-based collaboration platform that securely allows global sharing of medical images and associated data between facilities, physicians and patients. The solution is universally accessible via browsers as well as mobile devices. By making images available at critical times, we help organizations avoid repeat exams and excess radiation

**Reimer:** At RSNA, Philips unveiled Imaging 2.0 — a new approach to clinical collaboration to drive innovation and efficiency in radiology. Under this strategy, we introduced several solutions to enable radiologists to integrate information from various sources and work together with clinical partners. Our goal is to put the radiologist at the center of the decision-making process, to help increase diagnostic confidence and support better patient outcomes.

**Gardner:** We continue to learn the latest in VNA technology and educate clients on requirements of a VNA.

**Holodak:** Sony Medical provides a mammography film imager that is cost-effective and reliable for those working in the field of detection and diagnosis of breast cancer. It helps technologists meet requirements for Mammography Quality Standards Act (MQSA) guidelines and also provides high-quality patient films for physicians.

**Danahy:** RSNA 2010 provided significant validation to the product

development direction and business strategy of our company. As a provider of advanced 3-D clinical applications via thin-client, we demonstrated our latest release of Visage 7, a thin-client 3-D PACS solution. Many came to us with legacy technology issues, updated workflow demands, EMR integration requirements and business challenges tied to the economic downturn.

Our approach: Put an application in the hands of physicians who can “package” their professional acumen with universal, archive-neutral viewing technology to improve their competitiveness and care delivery; offer economical, flexible procurement options that minimize risk and maximize revenue generation; and provide applications that scale effectively to deliver administration-free access through EMR and mobile devices.

## 3. What was the consensus of opinion at RSNA 2010 about the impact of the economy and the current state of healthcare reform?

**Sharafshahi:** Economic downturns have their place and help eliminate weaker organizations as well as facilitate strategic acquisitions. For companies that have withstood the recession and have strategically positioned themselves, the coming years should provide a good environment for sustainable growth. Meeting the criteria for meaningful use and helping clients access the allocated government funds will be the most immediate result of healthcare reform in 2011.

**Reimer:** While the economy has certainly affected hospital purchasing, we believe the worst is behind us. While it is too early to tell how healthcare reform will impact the industry in its entirety, we believe expanded access to healthcare would mean more patients in the system, therefore increasing money spent on healthcare and the need for medical innovation — particularly for technologies that can help improve efficiency and drive down costs.

**Gardner:** The impact of the economy has been the most challenging in our lifetime, and the current state of healthcare reform is a mess. Many see the most recent elections as a sign of “hope.”



**Holodak:** Everyone knows healthcare costs are on the rise and it is important to provide products and services that meet industry needs. Our products give users the convenience to spend for what they need, when they need it and not overpay.

**Danahy:** Both healthcare reform and economic constraints still weigh heavily on the minds of physicians and administrators, but not to the point of inaction or acquiescence. Most RSNA attendees sought alternative and unconventional strategies to get ahead of the relative chaos. The influences of other industry trends (cloud computing, service as a solution [SaaS] business models, social business networking) were apparent and indicated an enthusiasm to abandon the traditional vendor-consumer relationships of the past. We were encouraged by the energized entrepreneurial edge most expressed in our interactions. Though best defined as cautious optimism, there was clear intelligence and wisdom in their depiction of current challenges.

## 4. What was the buzz about radiology's key growth areas going forward?

**Sharafshahi:** Now that practically all of the U.S.-based hospitals and imaging organizations are digital and utilizing PACS, we strongly believe making this data more easily accessible and integrating it with other information

systems like EMR/EHR/PHR/HIE will be a major growth area.

**Reimer:** We believe there will be significant growth in solutions that improve collaboration and workflow. With an increasing number of patients and the need to review data from multiple modalities, radiologists are challenged with keeping up with the volume of studies that must be interpreted and reported on multiple workstations.

**Gardner:** We heard growing discussion of radiology imaging expanding into all of imaging and providing the imaging services for cardiology.

**Danahy:** Radiology growth appears to be reliant on maximizing patient throughput and resource utilization while delivering better, more detailed results. Hospitals and imaging centers will be forced to operate leaner as reform takes hold, but there will be tremendous opportunity in the years ahead. With an aging population and the likelihood that more government-insured patients will increase demand, the sophistication and efficacy of imaging technologies will be proportionally in demand as well.

### 5. Tell us about the first RSNA you or your current company attended and your experience of the event's evolution over the years.

**Sharafshahi:** My first RSNA was more than 10 years ago in the midst of the digital revolution of radiology and the advent of PACS adoption. Accelarad was a fledgling startup at the time, looking to make its mark as the first cloud-computing PACS solution. As to the evolution of RSNA, I can't say that too much has changed, other than what is on display every year and the size of the event.

**Gardner:** I was an employee at my first RSNA, and for the last 23 years have been self-employed. In my earlier years, it was an overwhelming experience. Now I continue to ask why we still hold it in Chicago when there are

many more affordable, comfortable and convenient locations around the United States. Tradition is one thing, but common sense and business need to be considered as well.

**Holodak:** My first experience at RSNA was quite impactful. I remember walking around the exhibit hall late the night before the show opened and thinking, "What a mess. How will all of this ever be done?" I came in the next morning and was amazed at the overnight transformation. It was as if magical elves came in and cleaned the aisles, laid the carpet and brought the whole thing to life. Every year, the same phenomenon occurs. The biggest evolution has to be the continued growth and participation of the exhibitors and attendees alike.

**Danahy:** The RSNA technical exhibits of the mid-90s used to be exclusively about modality innovation – with millions of dollars in play for the major players. The frenzy and hype was incredible, along with the amount of effort expended to attract supporters. With imaging centers popping up everywhere, it was easy to see why the show revolved so heavily around these products.

This year, what struck me was the diversity of solutions attendees sought from their technical visits. Customers returned to the notion that meeting their business objectives starts with vendor independence. Interoperability, interchangeability and accountability are expected more than in the past.

The skepticism of the technical exhibits, affectionately referred to as "RSNA = Real Stuff Not Available," also seems to be dissipating. Attendees have limited patience for unproven technology or inflexible business models and detect flash over substance almost instantaneously.

### 6. Describe one of your most indelible memories of RSNA over the years.


**Sharafshahi:** I can confidently say that it did not involve a late Wednesday

night at Excalibur. Rather, it is more of an amalgam of fond memories of the annual reunion with old and new customers and partners over the years that have formed a community with a genuine interest in innovation and making truly relevant improvements to the delivery of healthcare.

**Gardner:** As much of an impact as the emergence of the digital era has had on our industry, dealing with the associated challenges of evolving regulations from people outside our industry has been just as great. However, having a radiologist ask "if he could run his finances" on a teleradiology system I was trying to sell him (1986) had to be one of the most memorable.

**Holodak:** Probably my most enjoyable RSNA memory was when Sony Medical expanded its product line and increased its booth to a very large venue. Although it was not quite the size of some of the big medical manufacturers, I remember thinking how proud I was to be a part of the radiology community and representing our products.

**Danahy:** Most of the indelible memories of RSNA occurred off the exhibit floor, but that's another story. Chicago is a great city and a great venue for the conference. The opportunity to reconnect with colleagues and customers as well as the chance to make new acquaintances always makes the event exciting and rewarding.

I'll never forget my first RSNA — or the relief I felt the year my first son was born, which meant I was able to skip it! 

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*Jeanne-Marie Phillips is president, HealthFlash Marketing Communications,*



*a public relations firm specialized in healthcare. Contact: jphillips@healthflashmarketing.com, 203.977.5555, healthflashmarketing.com.*