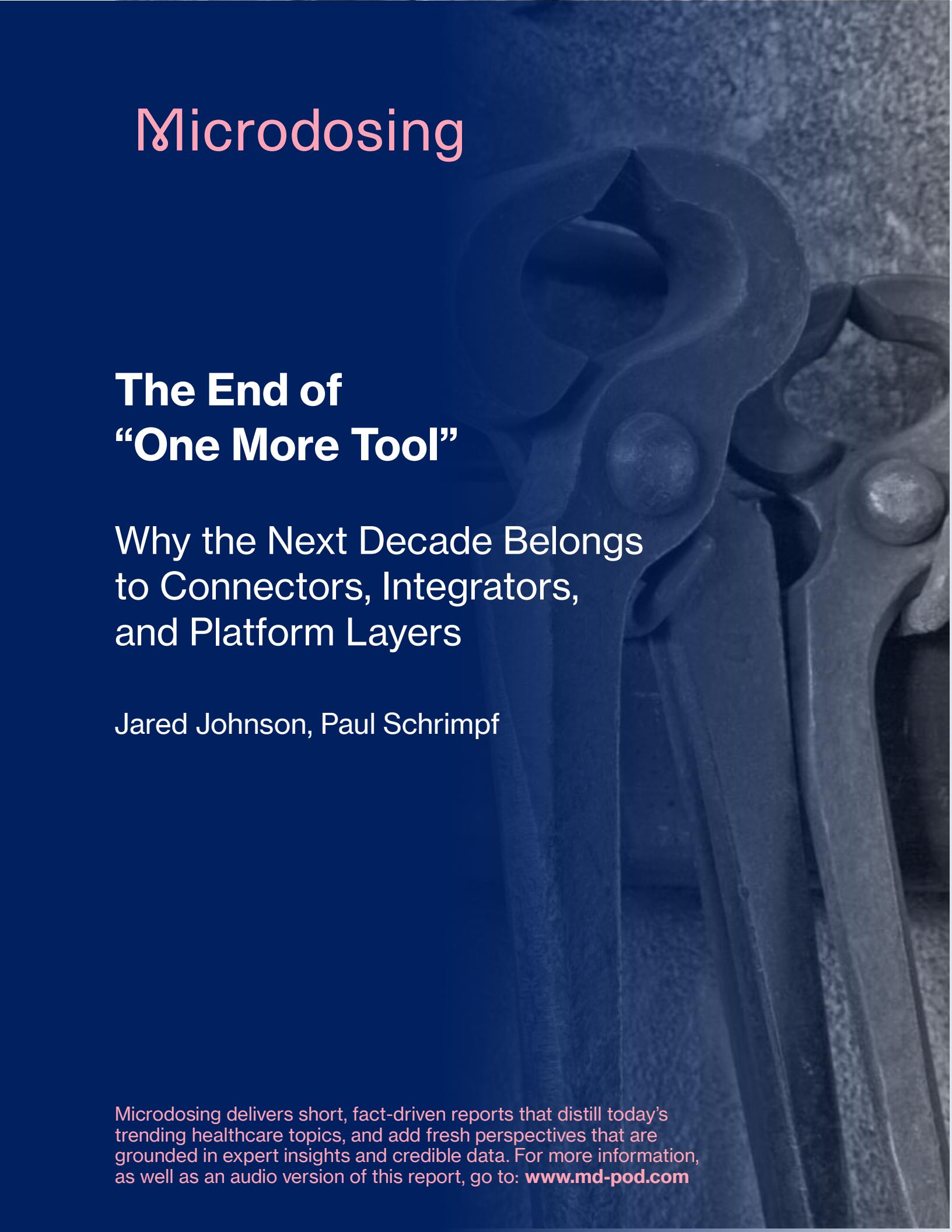


Microdosing



The End of “One More Tool”

Why the Next Decade Belongs
to Connectors, Integrators,
and Platform Layers

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If you've attended any healthcare conference, a pattern emerges so consistently that it becomes impossible to ignore: healthcare is not suffering from a lack of innovation. It is suffering from an oversupply of disconnected innovations, where each one is well-intentioned, each one promising value, and each one adding yet another layer to an already unmanageable tech landscape.

A.J. Loiacono of Capital Rx captured this with rare clarity. "Healthcare doesn't need more apps," he said. "It needs fewer disconnected systems pretending to be ecosystems." The line is memorable because it is painfully accurate. Point solutions proliferated by solving narrow problems in isolation, leaving health systems to assemble them like mismatched puzzle pieces.

Loiacono deepened the critique with another observation: "Every time you add a tool that doesn't talk to anything else, you're adding work, not solving it." This is the paradox of digital health today. The industry is more innovative than ever and more fragmented than ever. Leaders are weary of stitching tools together with operational duct tape.

Integration, Not Innovation, Is the Bottleneck

Frank Harvey, CEO of Surescripts, grounds the issue not in vendor ambition but in operational reality. "You accelerate safety and efficiency when everybody sees the same data at the same time." It sounds simple, but simplicity is exactly what healthcare lacks. The absence of shared context, combined with the proliferation of competing contexts, causes even the best-designed technologies to underperform.

Harvey sharpened the point further: "Most breakdowns aren't clinical failures. They're information failures." When data doesn't flow, workflows don't flow. When workflows don't flow, care doesn't scale. Yet the industry continues to add tools when what it actually needs is alignment.

This is where orchestration becomes unavoidable. The companies gaining real traction are not launching yet another standalone product. They are reducing the cost of complexity. They integrate, normalize, and sequence data. They fit into messy, real-world infrastructure. They do not assume pristine implementation environments. They assume entropy and build for it.

Tanay Tandon, CEO of Commure, articulated this reality with precision. "If your solution can't coexist with a messy, real-world stack, it won't scale." He reinforced it with an even sharper framing: "Healthcare doesn't have greenfield problems. It has brownfield expectations." In other words, if you cannot plug into what already exists, you will never reach the scale your business model demands.

Orchestration Is the Product Now

From TytoCare to Ovatient, from Best Buy's Current Health to Artisight, from care-at-home innovators to hospital command centers, leaders across the industry are converging on the same conclusion: the companies that succeed do so by stitching systems together, not by adding new layers of fragmentation.

Remote monitoring companies only achieved scale when they integrated into scheduling, documentation, care planning, risk scoring, billing, and escalation pathways. Care-at-home models expanded only when their triage logic aligned with existing nurse call centers and virtual care teams. Leaders at Tampa General described how new digital capabilities must “snap into” the command center’s infrastructure. If they sit beside it rather than inside it, they create more noise than value.

Consumer experience leaders echoed the same principle. The digital front door cannot succeed if it leads nowhere, or if the middle and back office remain disconnected. A beautiful interface is meaningless when the underlying ecosystem is still fragmented. Across every successful example, one truth holds: orchestration is not the wrapper around the product. Orchestration is the product.

It is the value engine, the differentiator, the reason customers renew, and the only path to durable, defensible scale. A point solution improves a task. An orchestrator improves a system.

The Financial Reality: The Era of “One More Tool” Is Over

After the pandemic, health systems entered the most financially constrained decade in recent memory. Leaders are no longer accumulating digital experiments. They are consolidating them. The appetite for tools that deliver incremental benefit but impose substantial operational burden is effectively zero.

The companies winning today are those that help organizations increase throughput, unify data, reduce redundancy, improve care coordination, and absorb new capabilities at minimal marginal cost. Orchestrators create the conditions under which hybrid operations, including physical, virtual, and home-based care, can effectively function. Without orchestration, hybrid models collapse under the weight of duplicated workflows and incompatible data streams.

This shift also forces a change in how vendors position themselves. A point solution sells features and niche improvements. An orchestrator sells capability. That capability includes coordinating across settings, normalizing performance across sites, deploying once and extending everywhere, and integrating seamlessly into existing infrastructure.

As Loiacono noted, the problem isn't apps. It is pretending that a cluster of disconnected tools is an ecosystem. As Harvey observed, safety and efficiency emerge only when everyone shares the same data reality. And as Tandon reminded us, success depends on surviving and thriving inside the messy, layered, real-world stacks that define healthcare.

The Next Decade Belongs to Orchestrators

Breakthrough innovation will not happen without orchestration. The market is no longer rewarding point tools. It is rewarding connective tissue. The companies that will define the next decade are those that make everything else work better together, those that turn fragmentation into flow, data into decisions, and digital noise into clinical clarity.

For anyone navigating what comes next, the question is deceptively simple: does this make everything else work better, or does it quietly add another dependency? Orchestration rewards patience, humility, and systems thinking over speed and spectacle. It favors companies and leaders willing to integrate before they differentiate, to fit before they expand, and to earn trust by absorbing complexity rather than exporting it.

That path is not easy, but it is durable. And in a healthcare system desperate for coherence, durability is no longer optional.

References

Insights for this report were exclusively sourced from podcast interviews on Healthcare Rap

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