

A photograph of a hospital hallway with several gurneys lined up on the left. The gurneys are covered with blue and gold patterned blankets. The hallway is brightly lit, and the floor is polished. In the background, there are medical equipment and a person walking. The overall scene is clean and professional.

Gartner®

Healthcare Supply Chain Top 25 for 2023

Actionable insight to unleash the power
of supply chain

25

Healthcare supply chains matter. When done right, supply chains improve the health of a community through enabling cost-effective, reliable and socially responsible delivery of products and services that impact patients.

The 15th annual Gartner Healthcare Supply Chain Top 25 ranks the 25 leading supply chains among U.S. health systems. The lessons from leaders are designed to guide the supply chain transformation needed to improve patient outcomes and control costs.

The methodology for the 2023 ranking is 55% qualitative data and 45% quantitative data. Qualitative data comes from two independent panels — a peer panel and a Gartner analyst panel. Supply chain leaders and academia are eligible to be on the peer panel. Gartner balances peer voters across geographies, health systems, manufacturers, distributors and industry experts. All panelists consider specific capabilities that improve human life at sustainable costs. Additionally, analysts review any Supply Chain Research Information Packets (SCRIPs) submitted by eligible health systems (SCRIPs are optional). Quantitative data comprises Quality of Patient Care, Bond Rating and Environmental, Social and Governance (ESG).

This report excerpts from the Gartner Healthcare Supply Chain Top 25 for 2023 research. Gartner clients may access the complete research in its entirety on [gartner.com](https://www.gartner.com).

Key themes

Through Gartner Healthcare Supply Chain Top 25 research, we note what leading organizations are focusing on, where they are investing time and effort, and what can be applied broadly. The following three key themes rose to the top this year for leaders in healthcare supply chains.

2023 key themes



**Building a Digital
Supply Chain**



**Attracting and
Retaining Talent**



**Developing an Antifragile
Supply Chain**

Source: Gartner



Building a Digital Supply Chain

Leading health systems are focusing their resources on building a digital supply chain through implementation of initiatives related to data analytics, technology solutions and automation.

The major drivers of this theme are organizations leveraging technology to automate tasks, upgrading core supply chain systems from on-premises to cloud-based versions and building analytics capabilities for specific use cases to tackle backorder issues and build demand planning.

Forty percent of supply chain leaders responding to the 2022 Gartner Healthcare Provider Supply Chain Organization Structure and Group Purchasing Organization Survey cited data analytics/digital supply chain initiatives as their top priority. Nineteen percent cited automation initiatives as their second priority. They said they will be investing additional capital in these initiatives within the next three to five years.

Increasing Focus on Digitization and Data Analytics

Many leading organizations are looking to cut costs and derive efficiencies by using technology and automation. Digitization trends have moved from using enterprise resource planning (ERP) systems for transactional purposes to building control tower frameworks for functional domains within the supply chain.

Fast Evolution of Technology Use Cases

As the supply chain's span of control increases to cover clinical engagement and active collaboration with clinical staff, there are also trends suggesting that technology is evolving fast in this space. Technology use cases now include active management of preference cards, analytics tools for value analysis and physician engagement.

→ **Take action to advance the supply chain digitalization journey. Visit [gartner.com](https://www.gartner.com) to access insights on supply chain technologies and digital transformation.**



Attracting and Retaining Talent

Organizational design and talent have always been foundational capabilities of the leading supply chains, and among many health systems today, attracting, developing and retaining talent is more important more than ever. The challenges and opportunities reside at all levels of health system supply chains, and leaders are developing intentional strategies to optimize talent management for the organization and the individual.

Increasing Value of CSCOs Seen as Leaders

Many leading health systems are valuing supply chain leadership more than ever. Our research shows that the investment in title has paid dividends. Gartner held its Organization Design and GPO Study in 2019, and again for 2023, polling 58 leaders of supply chains at U.S. health systems. Based on this research, CSCO as a title has grown from 24% of the role in 2019 to 33% in 2023. Of the Top 25, 52% of supply chain leaders have the CSCO title.

Greater Challenges in Attracting and Maintaining Frontline Talent

Competition for entry-level and hourly wage roles has many supply chain leaders seeking new and innovative approaches to the way they use automation in warehouses and in logistics roles at hospitals. RPA is a solution for a number of roles — mostly in the procurement function — to alleviate some of the pressure.

Many leaders are also revising legacy job descriptions and partnering with human resources in new ways. They are seeking a sustained supply chain effort, creating supply-chain-specific career paths and making wages more competitive. Leading health systems are developing training initiatives focused on attracting local community talent and training them on industry-specific knowledge and skills.

Much of this is part of change management efforts that put the supply chain leader in an educational role regarding the evolving importance of the supply chain function. After all, healthcare supply chains represent 36% of the cost of providing patient care.*

→ **Journey toward a more effective supply chain organization structure for the next-generation supply chain workforce. Visit [gartner.com](https://www.gartner.com) to access insights on supply chain organization design and talent.**

* 2022 Gartner IDN Hierarchy of Supply Chain Metrics Benchmark (Fall 2022).



Developing an Antifragile Supply Chain

Prioritizing Initiatives to Drive Antifragility

To achieve antifragility, health system supply chain leaders need to first establish clear definitions for fragile, resilient or antifragile. Using these definitions to diagnose their current state and anticipate the likely impact of uncertainties, supply chain leaders can then prioritize initiatives to drive antifragility.

Increased Commitment to Building Risk Management

Three-quarters of the healthcare providers responding to the 2023 Gartner Risk and Resiliency Survey said they have assigned “high priority” or “extremely high priority” to building risk management within their supply chain. Another 56% have organized a team for building a disruption response model, developing resiliency scorecards and sourcing strategy changes.

More Risk and Resiliency Initiatives

Example risk and resiliency initiatives include: nearshoring or onshoring the manufacturing of critical supplies; collecting demand planning data; and devising business continuity plans. Industry initiatives such as the Healthcare Industry Resilience Collaborative (HIRC) have championed the development of standards for the industry to adopt risk resiliency strategies.

→ **Watch our webinar “Antifragile Supply Chain — Thriving Due to Uncertainty” on demand to learn the capabilities you need to reach an antifragile supply chain state.**

Supply Chain Masters lead the way

These Masters have attained top 5 composite scores in the Gartner Healthcare Supply Chain Top 25 for at least seven out of the last 10 years (2013-2023).

Intermountain Health

- Intermountain's successful merger with Denver-based SCL Health moved it into the multistate realm.
- Intermountain has stayed true to its supply chain's governing principles of value generation, resiliency and scalability.
- Intermountain is expanding its self-distribution model to increase resiliency and manage costs.
- Improved fleet management, with additions of EV vehicles and GPS tracking technology, helped Intermountain reduce CO2 emissions by 12% and increase miles per gallon by 14%.
- Leadership is engaging caregivers and the supply chain team in a program called Totally Awesome Innovations (TAI). TAI rewards new ideas across six critical categories: safety, total cost, customer satisfaction, productivity, price savings and small innovation.

Mayo Clinic

- Mayo Clinic crossed \$16 billion in net patient revenue this year.
- Mayo Clinic's strategic priorities include a focus on delivering products, information and solutions along with improving operations to transform the supply chain.
- Mayo Clinic's model of supply chain excellence has resulted in its successful commercial application of its own supply chain services — the Captis purchasing organization.
- Mayo Clinic continued to invest in its digital supply chain platform strategy with implementation of a new cloud-based ERP and control tower solution.
- Mayo Clinic continues to lead on developing antifragile capabilities through its cofounding and ongoing support of HIRC.

Gartner Healthcare Supply Chain Top 25 for 2023

01

**Cleveland
Clinic**

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**Corewell
Health**

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AdventHealth

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**Stanford
Health Care**

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**Advocate
Health**

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Banner Health

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Allina Health

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**Bon Secours
Mercy Health**

11 UPMC

12 Baylor Scott &
White Health

13 Rush Health

14 Trinity Health

15 Geisinger

16 Sutter Health

17 Ochsner Health

18 Johns Hopkins
Medicine

19 Scripps Health

20 Ascension

21 Henry Ford Health

22 CommonSpirit
Health

23 Novant Health

24 Duke Health

25 Providence

Turn the page to read excerpted profiles of the health systems ranked 1-10. Gartner clients may access the complete research in its entirety on [gartner.com](https://www.gartner.com).

01

Cleveland Clinic

Cleveland Clinic earns our top spot for the third year in a row, having ranked in the top five for six consecutive years. Cleveland Clinic achieved this with tailwinds from top peer and analyst opinion scores and a 10 in ESG.

Cleveland Clinic's leadership in supply chain was on full display in 2023. It is a \$13-billion health system with a presence in London and Abu Dhabi, in addition to its 20 other locations in the United States and Canada. Cleveland Clinic is a local leader in Ohio and an international leader in sustainability, diversity and collaboration with suppliers. Cleveland Clinic's mission is "to provide world-class care and experience for our patients while supporting our caregivers and community through industry-leading supply chain and support services."

Cleveland Clinic has a broad set of foundational capabilities that support improved patient care and contribute to revenue generation. It operates Excelerate, a committed physician preference item (PPI) group purchasing organization (GPO) that has long influenced areas such as pharmacy sourcing and data analytics. Cleveland Clinic's supply chain has also expanded its services in recent years to include patient transport, nutrition and its Red Coat offering that greets, directs and helps patients.

Cleveland Clinic focuses on a digital supply chain as well with citizen developers shaping RPA solutions. Autonomous guided vehicles (AGVs) also play a major role in the logistics function. It has deployed RFID technology in the operating room, invested in a sourcing and procurement platform and focused on better data analytics using AI-based applications.

On the collaboration front, Cleveland Clinic is tackling big areas of spend with complex supply chains. It dialed back consignment with one major medical device manufacturer and has worked with another to get patient-critical devices to its global sites.

While doing all this, Cleveland Clinic has managed to lead in ESG as well. Local initiatives like its DEI Accelerator have benefited their local community while leadership in sustainability with the Healthcare Anchor Network (HAN) and Practice Greenhealth has been a model for other health systems. In coming years, the supply chain's role in community health will explode and Cleveland Clinic is well-positioned to benefit from it. This year, it implemented a supply chain program to reduce pediatric food insecurity. Cleveland Clinic has also published a sustainability and global citizenship report for the past 13 years.

02

Corewell Health

Corewell Health moves up one spot to No. 2 in our ranking. Corewell, a 22-hospital Michigan health system with revenue topping \$15 billion, was formed last year with the merger of Spectrum Health and Beaumont Health. Its supply chain team led the integration effort and served as an early adopter of new processes to deliver value from it.

Corewell's supply chain strategy is built on four major pillars: build a diverse and high-performing team; deliver value and reduce costs through partnerships; eliminate unneeded variation; and increase supply chain resiliency.

As part of the merger and integration effort, major milestones such as GPO conversion, ERP integration and warehouse management system improvement were completed. Along with those efforts came the development of a system value analysis program, the creation of the supplier performance management team and a transformation of the strategic sourcing operating model.

A product standardization program was established and implemented in 2023. This multidisciplinary effort — that included participation from physicians, clinicians and operational teams — realized significant savings in the first few months of this year and is on target to lower costs by \$35 million before it's over. A centralized project management office within the supply chain was also created in 2023 as part of this integration effort. The team began consolidating two customer supply chains (CSCs) into one and expects to complete this process in 2025.

In collaboration with clinicians, Corewell's supply chain established an early-warning score for approximately 12,000 SKUs, which resulted in creating a proactive planning process to monitor backorders and recalls, and reducing disruption of critical items. This initiative is a good example of an antifragile capability and led to a decrease in supply stock-outs by 38% since its implementation.

As Corewell continues its journey toward further supply chain success, it is working on several key initiatives including a procedure card program to reduce waste, a supplier diversity program and a systemwide sustainability assessment for input to a five-year strategy.

03

AdventHealth

AdventHealth moves up three spots this year in our ranking to No. 3. AdventHealth improved in four of our criteria for 2023: peer opinion, analyst opinion, quality of patient care, and ESG metric.

This \$17-billion health system ranges across nine states with 51 hospitals and more than 900 clinics. AdventHealth's rise in the Top 25 ranking is a testament to its leadership and executive support of the supply chain. Its supply chain has grown with the organization, as this system grew from \$11 billion to \$17 billion over the last five years. Key investments in people and resources have moved AdventHealth steadily up in our ranking from its debut at No. 10 in 2021.

This health system leads in clinical alignment, collaboration, resiliency and ESG. Advent launched a system ancillary and support-services-connected model to bring together critical variation reduction, service improvement and cost reductions through a shared governance model for the following areas:

- **Ancillary services:** laboratory, respiratory, pharmacy, radiology and radiation oncology
- **Support services:** nutritional, biomedical engineering, facilities, environmental services, and security

AdventHealth's supply chain plays a key role in the connectivity of services supporting care. Over the past three years, AdventHealth has greatly accelerated its span of control over additional areas of supply chain spend and service. Trust in leadership and the ability to deliver combined to drive investment and value realization.

AdventHealth is collaborating with a large distribution company on a more resilient supply chain led by a partnership in the development of a CSC in Central Florida.* Joint investment and innovative staffing models make this partnership one to watch in lowering costs, reducing joint inventory and improving service.

The health system has also accelerated its leadership toward ESG goals, especially sustainability. A national leader in advancing supply chain's role in baselining, ongoing measurement and reducing CO2 emissions by 2030, AdventHealth's CEO has spoken on the importance of health systems' roles in all components of ESG at Modern Healthcare's ESG Summit.

*AdventHealth, Medline Ink Unique Partnership to Expand Supply Chain Resiliency, AdventHealth.

04

Stanford Health Care

Stanford Health Care leaps nine spots to No. 4 in our ranking based on improvements in peer and analyst opinion and an ESG score of 10. Stanford, a health system with \$10 billion in revenue, has adopted a strategy that involves all departments making meaningful investments in people, processes and technology.

In 2023, Stanford's supply chain embarked on several initiatives including an ERP conversion to one system across the enterprise, a contracting center of excellence and an organizational structure heavily built on strong governance. Stanford also led in ESG by putting emphasis on sustainability. It implemented a new procurement process with dedicated resources to oversee supply chain sustainability and diversity programs. Stanford also supported local suppliers, which led to a \$250 million diverse supplier spend over the last three years.

On the resiliency front, Stanford invested in medical resources and developed an initial model for clinical and supply chain criticality assignment of products. An auto-substitution program was implemented by partnering closely with its distribution partner. The supply chain team worked to successfully build an interface between Stanford's multiple ERP systems and its distributor's inventory system. Then, it implemented an automated substitution process for clinically approved alternatives. Additionally, the team partnered with a technology vendor to institute improved pricing accuracy. This initiative was a huge success, with better fill rates, more accurate pricing, reduced price exceptions and increased efficiency.

The supply chain business intelligence and analytics team is another key area of success. It adopted an agile project management process to build tools to automate workflows related to vendor management, inventory management, reporting and logistics operations. This team built 40 solutions in its first year that resulted in the automation of 740 hours per month of what had previously been manual work.

In the coming year, Stanford will continue its digitization journey with implementation of a single version of its ERP system and a contract life cycle management solution.

05

Advocate Health

The newly formed Advocate Health debuts at No. 5 in our ranking based on balanced solid scores across all the ranking criteria and a 10 in ESG. In many ways, Advocate Health is a nod to the past and a wave to the future. Two recently merged health systems — Advocate Aurora Health and Atrium Health — combined in December 2022 to form Advocate Health, a six-state, 67-hospital health system with \$30 billion in revenue.

Advocate Health operates primarily in Charlotte, North Carolina, and the Chicago/Milwaukee area. Merging two \$15-billion supply chains is a formidable task, and Advocate is making great progress in leveraging the strengths of the two organizations and forging a unified strategy. Leadership is strong in the supply chain. But mergers can be difficult, and this one has scale challenges, noncontiguous state hurdles and two ERP solutions in place.

Even so, the team is showing early savings by bringing the largest suppliers together and by implementing a three-pronged process for analyzing immediate cost reductions for common products under contract. It is also deriving savings from switching suppliers and from new opportunities now available to the combined entity. Within its first eight months, Advocate documented significant savings with more on the horizon for 2024 as additional standardized practices and agreements are implemented.

Advocate Health has great clinical value analysis roots from both of its original organizations. The merger, along with the capabilities of its own GPO — AHSCA — is bringing value. These value analysis and GPO capabilities have helped Advocate get to value faster in the merger and are core pillars of the supply chain strategy moving forward.

In fall 2023, Advocate Health is scheduled to launch its Center of Supplier Diversity and Entrepreneurship. This center is built within the Partnership, Outreach and Research to Accelerate Learning (PORTAL) ecosystem. This group has more than 35 companies, community incubators and academic partners all under one roof fostering inclusive innovation to deliver investment and economic development faster for diverse businesses.

06

Banner Health

Banner Health comes in at No. 6, supported by strong analyst opinion, an increase in peer opinion and high ESG scores. Banner is a \$12-billion health system providing services in six states.

Banner's supply chain vision is to create an industry-leading organization focused on cost, quality and outcomes (CQO) through standardization of product and information. Over the years, Banner has successfully implemented this "Triple Aim" of CQO with a sharp focus on hiring strong supply chain leaders and creating a robust governance structure.

In 2023, Banner continued making capital investments in three areas: digital technologies, warehousing and ESG. This year, Banner's digital transformation journey, which began two years ago, was focused on building an end-to-end supply chain digital toolbox that includes requisitioning, master data management, point-of-use integration and a warehouse management system. Banner implemented the warehouse management system a few years back and is now focused on optimizing the visibility function and building a control tower solution.

Banner's ESG initiative has grown significantly, and the spend with diverse suppliers has consistently increased in the last few years. This year Banner hired a dedicated FTE to lead the supplier diversity program. It has focused on increasing its local spend with nearly \$200 million going to companies headquartered in Arizona.

Banner's resiliency team focused on key areas of building a crisis-response model, creating disruption communications and using scorecards/metrics to measure performance. Banner's supply chain team was awarded the GHXcellence Award for Collaboration for its active partnership with Cardinal Health in supporting the needs of patients and communities. Banner's Supply Chain Services group is developing and building the principles of a "One Supply Chain — High Reliability Organization" into its supply chain operations.

07

Northwestern Medicine

Northwestern Medicine moves up five spots this year to No. 7 in our ranking. Northwestern has been steadily progressing over the past 10 years and achieved this position based on a great bond rating and increases in all the other components of the ranking, including quality of care, peer and analyst opinion, and ESG.

Northwestern is a success story of sustained supply chain leadership meeting the opportunity of a growing system. This \$9-billion, 11-hospital system in northern Illinois built a great team combining clinical alignment and sourcing expertise with an expansion of supply chain span of control into some key areas like pharmaceutical spend, capital spend and purchased services.

Northwestern's supply chain partnered with the procedural areas — including surgery, gastrointestinal medicine, catheterization labs, interventional medicine, extrapyramidal symptoms — at all 11 hospitals to standardize an inventory control process. This led to \$8 million in savings and reduced inventory by \$3.8 million.

Northwestern also developed the “Supply Chain Daily Management System” to help build an improved culture of service, personal development and optimization of scheduling through better engagement.

Northwestern received SMI's Tom Hughes Collaboration Award in 2023 for its project to design and implement an improved and automated bill-only process with Casechek. This project improved overall compliance associated with documenting supply usage for procedural cases and improved the procure-to-pay process by eliminating late bills and improving the revenue cycle.*

*SMI Announces Northwestern Medicine and Casechek as 2023 Tom Hughes Collaboration Award Recipients, SMI.

08

Allina Health

Allina Health leaps to No. 8 in our ranking, jumping up 12 spots — the largest upward movement of any health system in the ranking — based on top quintile quality of care scores, quantitative contributions from ESG criteria and improvements in peer and analyst opinion.

Building on its trajectory over the past few years toward stronger governance and supply chain leadership, Allina has made great strides in strategic initiatives aimed at accelerating performance improvement. This year, the health system launched “Allina Forward,” a set of 20 different workstreams and initiatives aimed at improving financial performance. One such initiative was the non-labor workstream, with a goal of reducing non-labor spend in several categories and expanding the supply chain’s span of control. This has led to its supply chain being involved in coordination of procedural-based areas and focused on reducing variation, increasing compliance and decreasing spend.

A digital solution was implemented with a startup technology company that allows Allina’s supply chain and clinical management to engage surgeons in reducing variation by displaying supply usage information to physicians.

On the ESG front, Allina launched a program with specific goals such as increasing diversity supplier spend to \$100 million by 2026 and achieving a 50% reduction in greenhouse gas emissions by 2030. Allina also built a dashboard to measure sustainability KPIs. For these ESG efforts, Allina Health received the “System of Change Award” from Practice Greenhealth for its commitment to improving environmental performance and efforts to build sustainability and resiliency.

Allina’s supply chain team developed a dashboard in collaboration with its primary distributor. A reporting tool was also created to include critical backordered items and their substitutes from the GPO’s database.

09

BJC HealthCare

BJC took the No. 9 place in our ranking. This \$7-billion health system with 14 hospitals and 100 clinics improved in peer and analyst opinion this year along with more ESG engagement.

BJC is doing many things right in the supply chain, from improved governance to clinical alignment to collaboration to home care.

BJC pioneered the development of a CSC, leveraging a large 3PL and logistics company to manage the facility while BJC retains ownership of the products along with the planning and procurement functions. Service is up, inventory is down and costs are lower while it builds a more resilient supply chain.

Collaboration goes beyond the distribution center, as well. BJC is partnering with a large medical device manufacturer around concepts like collaborative planning, forecasting and replenishment (CPFR) from retail to improve operating metrics and cash flow. It jointly funded a one-year supply chain fellow program with a medical device company to improve the end-to-end supply chain. With the help of another company, BJC focused on moving away from the tail of the spend, reviewing items and concentrating on the 12,000 items (out of 200,000) that drive 90% of the volume.

Next year, a proposed merger with St. Luke's Hospital in Kansas City, Missouri, is on the horizon, which would create a \$10-billion multistate health system.

10

Bon Secours Mercy Health

Coming in at No. 10 is Bon Secours Mercy Health (BSMH), jumping up four spots in the ranking. This was based primarily on higher scores in the ESG category, as well as in peer and analyst opinion. BSMH is an \$11-billion, 50-hospital system spanning four U.S. states and is the largest nonprofit provider in Ireland.

Advantus Health Partners, a subsidiary of the system, represents BSMH's supply chain function and is focused on bringing innovative strategies and solutions to other health systems.

ESG was a focus again this year, and BSMH was recognized as a "System of Change" by Practice Greenhealth for the second year in a row, with 31 BSMH hospitals winning awards. BSMH's supply chain leadership spoke at several industry events on ESG topics ranging from environmental sustainability to community engagement and supplier diversity.

Expanding the supply chain's span of control, BSMH and Advantus invested resources and technology heavily in purchased services, focusing on process design and sourcing efficiencies.





In 2023, BSMH announced its healthcare partnership and strategic investment in Emerge Manufacturing, a U.S.-based manufacturer that produces personal protective equipment. BSMH has made a 20% minority-stake investment in Emerge and is the company's sole health system partner.*

On the data analytics front, BSMH launched a new CQO tool that aims to address clinical variation to help improve care and reduce costs. This solution is used internally for benchmarking to national standards and the comparative analytics can be viewed by physicians to review their specific information.

*[Bon Secours Mercy Health Makes Strategic Investment in U.S.-Based Sourcing and Manufacturing of PPE](#), Bon Secours Mercy Health.

Actionable, objective insight

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