ISG Provider Lens™

# Healthcare Digital Services

## Healthcare Platform Implementation Services

Unveiling competencies of providers in the healthcare digital transformation space

Customized report courtesy of:

NTT DATA

**QUADRANT REPORT | DECEMBER 2023 | U.S.**

*Report Author: Rohan Sinha*

## Digital transformation continues to reshape the healthcare ecosystem

### Digital revolution in the U.S. healthcare sector

Digital transformation continues to be a priority among service providers operating in the U.S. They continue to revolutionize healthcare by enhancing efficiency, accessibility and quality of patient care. Integrated electronic health records (EHRs) streamline information sharing among healthcare providers, fostering a more cohesive and patient-centric approach. Telemedicine services use digital technologies to enable remote consultations, improving access to medical expertise and reducing geographical barriers. Data analytics and AI empower healthcare organizations to derive meaningful insights, leading to more informed decision-making, personalized treatments and proactive health management. Overall, the synergy between digital transformation and IT services is reshaping the healthcare landscape, driving innovation and optimizing patient and provider outcomes.

### Embracing equity, SDOH and holistic patient care

In the U.S., a transformative wave is reshaping the healthcare landscape, propelled by a collective push for equity and a deepened understanding of social determinants of health (SDOH). Conventional industry roles are becoming obsolete, with payers transcending their traditional functions to actively share the responsibility of overall health with their members. Behavioral change is the linchpin for favorable health outcomes, prompting providers to acknowledge the impact of people's actions on their well-being. Providers face the challenge of proactively identifying the most vulnerable individuals, leading to a strategic focus on engaging with communities, homes and workplaces. This strategic shift has intensified the reliance on electronic medical records (EMRs) and SDOH, employing descriptive and predictive analytics, ML and natural language processing (NLP).

The increasing use of **AI** and a huge amount of **data are pushing the healthcare industry to transform digitally**. It's not just a choice; it's a must.

Public health promotion programs and the cultivation of self-care awareness are critical to enhancing individual and population health outcomes. Simultaneously, there is a growing inclination to treat individuals as unique entities. Elevated awareness of behavioral and mental health has underscored the necessity for proactive care, driving an increased emphasis on treating people as individuals by applying advanced data models and algorithms for early diagnosis and prevention. Integrated health adopts a comprehensive and whole-patient approach, incorporating insights from SDOH to foster a more holistic and personalized healthcare experience.

**Rise of payviders in healthcare**

In the U.S. healthcare industry, the payvider model, a mutually beneficial partnership between a healthcare payer and a provider within the Medicare domain, is picking pace. This shift is motivated by a desire for health systems to play a more active role in risk management, pursue growth opportunities and gain a competitive advantage. Two primary factors fueling this trend include the industry's emphasis on value-based care and the Quadruple Aim, a framework where providers are incentivized for delivering quality care over quantity. Collaboration between providers and payers is seen as a strategic response to the challenge of providing cost-effective healthcare, with shared goals centered around reducing financial risk, ensuring profitability and enhancing overall patient experience. Payvider models take various forms, from healthcare providers creating their insurance plans to payers and providers forming alliances, illustrating a dynamic evolution in healthcare delivery and payment structures. The influence of the Centers for Medicare and Medicaid Services (CMS) and the emphasis on Accountable Care Organizations (ACOs) further contribute to the proliferation of payvider models, fostering a landscape where collaboration and quality-driven outcomes take precedence over traditional fee-for-service approaches.

**EHR/EMR transformation**

The current market landscape is witnessing a substantial upsurge in the demand for extensive electronic medical records (EMR) and electronic health records (EHR) solutions. Leading providers in the EMR/EHR space are strategically forming partnerships with service providers, marking a paradigm shift in how healthcare organizations approach their digital health infrastructure. These service providers are positioning themselves as the go-to partners for healthcare providers seeking comprehensive assistance, not only in EMR migration and implementation but also in navigating intricate installations and managing ongoing services.

The ability to offer customized solutions and tailor their approaches to meet each client's unique and specific requirements sets these service providers apart in an industry where one-size-fits-all solutions fall short. This adaptability gives them a distinct competitive edge. Moreover, these partnerships extend beyond the immediate implementation phase, often encompassing ongoing support and optimization efforts.

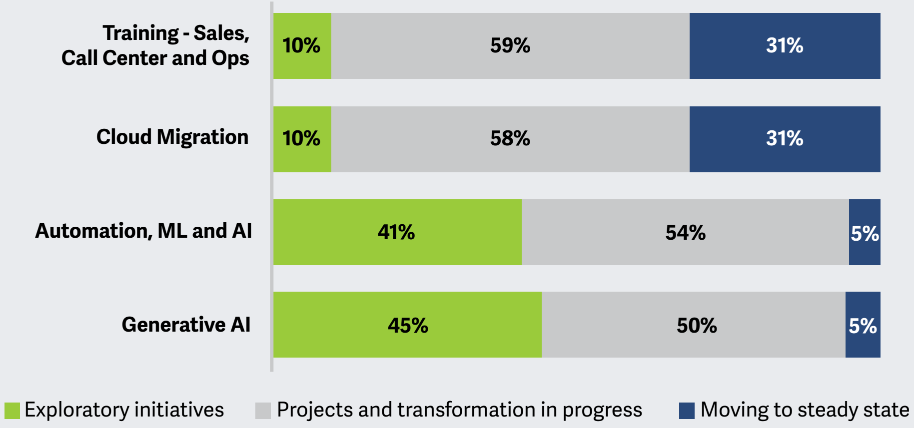
**Transforming healthcare through integrated platform innovations**

Service providers in the healthcare provider sector are increasingly focusing on enhancing platform capabilities. These platforms integrate consulting, advisory services, ecosystem partnerships, solutions, and delivery capabilities with industry expertise to facilitate a smooth client transition. The platform empowers the creation of flexible, reusable, secure solutions, incorporating the design of conversational and generative user experiences. The service capabilities of these platforms address specific areas for both payers and providers. They span from enrollment and eligibility, claims processing and risk and compliance for payers to EHR, ERP and clinical decision support for providers. Most leaders in the healthcare platform implementation services quadrant provide a comprehensive range of services catering to payers and providers. (Refer to Figure 2 & 3 – Platform table)

**GenAI And the move toward co-pilots**

The emergence of generative AI (GenAI) has profoundly disrupted what was once deemed achievable, and businesses are just starting to explore the innovative capabilities it brings. In conversations with various service providers, GenAI consistently emerged as a focal point of interest. Its applicability spans industries,

## Insurance Industry: AI Will Disrupt Steady-State Initiatives




Source: ISG Buyer Study – Insurance Industry Trends, n=120
Question: What is your org's status for of the following initiatives?

and the healthcare sector is actively recognizing its potential, crafting use cases for both payers and providers. Many providers have committed to substantial investments over the next five years to develop GenAI solutions.

These investments encompass creating solutions, establishing COEs, providing extensive training to employees and aligning with the evolving technological landscape.

**The ISG Buyer Behavior Study on the insurance industry** involved interviewing 120 senior IT and business leaders about their technology and business objectives, challenges, and plans. About a third of respondents say they are moving cloud computing, training and employee support initiatives to a steady state. However, ISG expects GenAI to impact technology capabilities and project economics to such a significant degree in the next two years that every decision about active projects will have to be completely re-assessed. (Refer to Figure 1)

Another significant point of discussion revolves around the concept of GenAI copilot, representing a method to harness GenAI efficiently and effectively. While only a few providers have implemented solutions in this domain, most have plans in the pipeline. Copilots hold the potential to address various business and clinical challenges within the healthcare industry, including clinician burnout and the pursuit of interoperability. Notably, a growing trend of copilot solutions is entering the healthcare arena. A case in point is Microsoft's introduction of the Nuance DAX Copilot, a GenAI-based clinical documentation product, in 2023. This innovative tool has already gained traction among many doctors. EPIC has partnered with Microsoft to expedite the adoption of GenAI-powered copilot tools, aiming to assist clinicians in saving valuable time.

Year after year, digital transformation continues to be an investment area for healthcare service providers to enhance efficiency, accessibility and patient care. This is due to new emerging technologies entering the healthcare landscape.

| Name of the Service Provider | Payer Capabilities | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Hyperscaler Partnerships | Enrollment & Eligibility | Provider Network Management | Claims Processing | Care Management (Utilization Mgmt, Population Health Mgmt) | Fraud Detection | Risk and Compliance | Member Engagement (mobile app, call center, campaign mgmt) | Value-based Spend Optimization |
| Cognizant | ✔ | ✔ | ✔ | ✔ | ✔ | ✖ | ✔ | ✖ | ✔ |
| EXL | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| HCLTech | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Infosys | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| TCS | ✔ | ✔ | ✖ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ |
| NTT Data | ✔ | ✔ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Accenture | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Optum | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Wipro | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |

✔ Yes ✖ Not in

| Name of the Service Provider | Provider Capabilities | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Hyperscaler Partnerships | Ancillary (Lab, Radiology, RX, etc.) | Electronic Health Records (EHR) | Telemedicine, Virtual Care, or Remote Monitoring | ERP | Revenue Cycle Management | Patient Engagement (mobile app, call center, campaign mgmt) | Analytics | Clinical Decision Support |
| Cognizant | ✔ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✖ |
| EXL | ✔ | ✔ | ✔ | ✔ | ✖ | ✔ | ✔ | ✔ | ✔ |
| HCLTech | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Infosys | ✔ | ✖ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ | ✖ |
| TCS | ✔ | ✖ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ | ✖ |
| NTT Data | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Accenture | ✔ | ✖ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Optum | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Wipro | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |

✔ Yes ✖ Not in

# Provider Positioning

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| | Payer Digital Transformation Services | Provider Digital Transformation Services | Healthcare Platform Implementation Services |
|---|---|---|---|
| Accenture | Leader | Leader | Leader |
| Atos | Product Challenger | Leader | Not In |
| Beyondsoft | Contender | Not In | Contender |
| Capgemini | Product Challenger | Market Challenger | Not In |
| Cigniti | Not In | Contender | Contender |
| CitiusTech | Rising Star ★ | Product Challenger | Product Challenger |
| Coforge | Product Challenger | Not In | Not In |
| Cognizant | Leader | Leader | Leader |
| Conduent | Product Challenger | Not In | Not In |
| Deloitte | Leader | Leader | Not In |

# Provider Positioning

**Page 2 of 4**

| | Payer Digital Transformation Services | Provider Digital Transformation Services | Healthcare Platform Implementation Services |
|---|---|---|---|
| DXC Technology | Contender | Not In | Contender |
| emids | Product Challenger | Not In | Not In |
| EXL | Leader | Product Challenger | Leader |
| Firstsource | Leader | Not In | Product Challenger |
| GS Lab \| GAVS | Not In | Product Challenger | Not In |
| Genpact | Product Challenger | Product Challenger | Product Challenger |
| HARMAN | Not In | Contender | Product Challenger |
| HCLTech | Leader | Leader | Leader |
| Hexaware | Not In | Product Challenger | Not In |
| HTC Global Services | Contender | Contender | Product Challenger |

# Provider Positioning

**Page 3 of 4**

| | Payer Digital Transformation Services | Provider Digital Transformation Services | Healthcare Platform Implementation Services |
|---|---|---|---|
| IBM | Market Challenger | Leader | Not In |
| Infinite Computer Solutions | Product Challenger | Product Challenger | Product Challenger |
| Infosys | Leader | Leader | Leader |
| Kyndryl | Market Challenger | Market Challenger | Not In |
| LTIMindtree | Leader | Product Challenger | Product Challenger |
| Mastek | Not In | Contender | Not In |
| Mphasis | Product Challenger | Not In | Product Challenger |
| NTT DATA | Leader | Leader | Leader |
| Optum | Leader | Leader | Leader |
| Persistent Systems | Product Challenger | Rising Star ★ | Product Challenger |

# Provider Positioning

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| | Payer Digital Transformation Services | Provider Digital Transformation Services | Healthcare Platform Implementation Services |
|---|---|---|---|
| PwC | Market Challenger | Market Challenger | Not In |
| Quantiphi | Not In | Not In | Contender |
| Rackspace Technology | Not In | Contender | Contender |
| TATA Elxsi | Not In | Not In | Contender |
| TCS | Leader | Leader | Leader |
| Tech Mahindra | Product Challenger | Leader | Market Challenger |
| UST | Leader | Product Challenger | Not In |
| Wipro | Leader | Leader | Leader |
| WNS | Contender | Not In | Not In |

The **Healthcare Digital Services 2023** study focuses on digital transformation solutions and services for payers and providers.

- **Payer Digital Transformation Services**
- **Provider Digital Transformation Services**
- **Healthcare Platform Implementation Services**

Simplified Illustration; Source: ISG 2023

**Definition**

With the convergence of technology and medicine, healthcare is transforming profoundly in the digital age. The public continues to seek improved healthcare outcomes at reduced costs, demanding transparency, suitable data sharing and access to personal records. The U.S. healthcare industry faces new regulations, competitive mergers, acquisitions and the needs of an aging population.

Advancements in digital health have brought a paradigm shift in how healthcare is accessed, delivered and experienced. From telemedicine and remote patient monitoring to analytics-based diagnostics and AI, digital healthcare solutions have emerged as powerful tools in improving access to care, enhancing patient outcomes and revolutionizing healthcare delivery models. The rapid integration of electronic health records (EHRs) has streamlined data management and enabled healthcare providers to make more informed decisions. The proliferation of healthcare apps and wearable devices has empowered individuals to actively participate in managing their health and well-being.

The Healthcare Digital Services 2023 study includes several criteria for service provider assessment, such as their proficiency in augmenting a client's technological organization and their contribution to the development of blueprints, architectural frameworks and management processes. Providers can offer insights into their vision and preparedness for upcoming technological advancements in the healthcare industry according to clients' future technological advancement plans.

### Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three (spell out the number of quadrants, do not use a digit) quadrants for services/solutions: Payer Digital Transformation Services, Provider Digital Transformation Services and Healthcare Platform Implementation Services.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market (GTM) considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

### Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

## Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

# Healthcare Platform Implementation Services

## Who Should Read This Section

This quadrant report is relevant to healthcare payers and provider enterprises across the U.S. for evaluating service providers platform implementation services to improve patient and member services.

In this quadrant, ISG highlights the current market positioning of service providers that offer healthcare implementation services to payers and providers in the U.S., highlighting how each provider addresses the rising demands and key challenges in the country.

Healthcare providers, payers and the entire ecosystem face persistent pressure to transform. The dynamic regulatory landscape, the need for cost-effective services, security concerns and the increasing demand for patient-member centricity pose a challenge. The U.S. healthcare market is actively pursuing integrated platform implementation services to address these challenges. Platform services aim to provide the optimal blend of services, skilled personnel, robust infrastructure and cutting-edge technologies to elevate healthcare services. In the present landscape of the U.S. healthcare market, leading the way involves providing precisely tailored platform services to meet the distinct demands of providers and members.

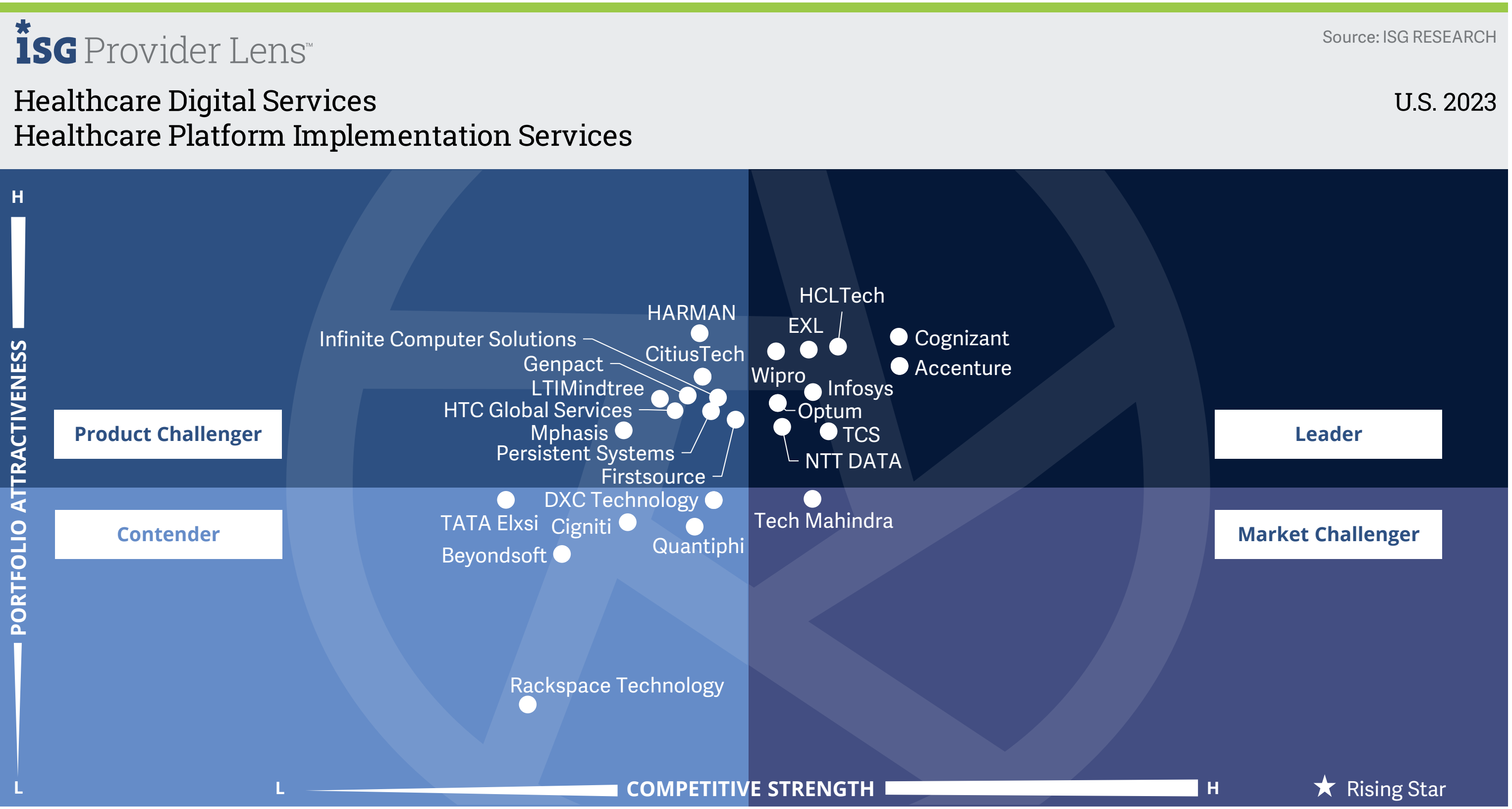
Leaders in the quadrant excel in delivering platform capabilities to achieve desired business outcomes. Anticipating a sporadic growth in demand for platform implementation in the coming years, service providers recognize the potential of a comprehensive platform service across healthcare and its ability to transform care. These leaders understand how such platforms can seamlessly address diverse challenges and revolutionize end-to-end operations to enhance care delivery.

**Digital professionals** should read this report to understand platform services in the healthcare sector and how top providers enable efficiency and effectiveness through platform implementation.

**Industry practitioners** should read this report to understand providers' relative positioning and capabilities of platform implementation services and their ability to deliver appropriate digital services and solutions.

**Technology professionals** should read this report to understand the technologies integrated into healthcare platforms and how cutting-edge technologies enhance efficiency.

**Cybersecurity professionals** should read this report to understand providers' adherence to meeting security and regulations without compromising payer and provider privacy and experience.




This quadrant assesses service providers' platform **capabilities for payers and providers, including their track record**, regulatory compliance, scalability, **seamless data exchange, integration** capabilities and use of advanced technologies for healthcare transformation.

*Rohan Sinha*

## Definition

Digital healthcare platforms serve as a technology-based infrastructure that seamlessly integrates, manages and delivers diverse healthcare services, data and applications, typically constructed upon private or public cloud foundations. This centralized hub caters to a spectrum of healthcare stakeholders, ranging from healthcare payers and providers to patients, caregivers and researchers, enabling access and interaction with health-related information and services.

These platforms harness advanced technologies such as cloud computing, mobile applications, IoT devices, AI and data analytics to facilitate an array of functions. These functionalities include electronic health records (EHR) management, telemedicine, remote patient monitoring, appointment scheduling, health tracking, personalized health interventions, medication management and data analytics for informed decision-making.

To ensure seamless data exchange, healthcare platforms prioritize interoperability while remaining scalable to accommodate mounting workloads. Rigorous security protocols and adherence to regulatory compliance stand as paramount safeguards for safeguarding sensitive patient information. Incorporating user-friendly interfaces, real-time data accessibility and integration with other systems contribute to operational efficiency. Harnessing data analytics provides pivotal insights for patient care while reliability, customization options and mobile accessibility uphold continuous, tailored and adaptable care provision.

In the healthcare sector, service providers offer two distinct service models. Some lay the groundwork for crafting bespoke healthcare platforms, tailoring systems to precise requirements. On the contrary, others furnish pre-built platforms that seamlessly integrate with a client's existing infrastructure and systems, simplifying the implementation process.

## Eligibility Criteria

1. **Proven track record in building healthcare digital platforms and experience working with hyperscalers** such as AWS, Azure, Google Cloud and Salesforce, especially in healthcare
2. **Adheres to regulatory requirements** such as GDPR (U.K.), Data Protection Act (U.K.), HIPAA (Health Insurance Portability and Accountability Act – U.S.), FHIR (Fast Healthcare Interoperability Resources – U.S.) and HITECH (Health Information Technology for Economic and Clinical Health Act – U.S.) compliance and other **relevant data protection regulations**
3. **Capability to build scalable and high-performing digital platforms** to handle healthcare organizations' and users' increasing demands
4. **Platform's ability to exchange data seamlessly** with other healthcare systems, such as laboratories and pharmacies
5. **Capabilities to integrate with existing healthcare systems**, such as EHRs, medical imaging systems and third-party applications
6. Leveraging advanced technologies such as **advanced analytics, ML, AI and generative AI** to transform and modernize the healthcare ecosystem and **enhance end-user experience**

## Observations

Healthcare platform implementation services are pivotal in transforming healthcare. These platforms streamline EHR management for providers by integrating AI, data analytics and cloud computing and enhance data accessibility. Simultaneously, they empower payers with efficient claims processing, advanced risk management analytics and personalized member engagement, thus meeting patient experience demands and value-based care models. These services integrate wearables, improve interoperability and bolster cybersecurity. The rise of telemedicine and collaborative efforts in the healthcare ecosystem solidify these platforms' role in fostering collaboration and improving outcomes for payers and providers amid the evolving healthcare landscape.

Industry leaders actively engage with U.S. payer and provider clients, forging robust partnerships with major hyperscalers. They excel in converging payer and provider services, prioritizing data integration and interoperability. Proficient in seamless streaming data ingestion, analytics and visualization, these leaders offer supplementary services such as implementation, integration, licensing and consulting. Most possess well-defined platform implementation capabilities and prioritize transformative initiatives in their technology roadmaps, incorporating GenAI, ML, blockchain, data and analytics.

From the 30 companies assessed for this study, 23 have qualified for this quadrant, with 9 being Leaders.

### accenture

**Accenture** excels in implementing healthcare platforms and prioritizing seamless integration, scalability and patient engagement through AI and analytics. Collaborating with Epic, Cerner, Salesforce, Oracle, SAP and Google Cloud, it tailors solutions to specific healthcare needs.

### cognizant

**Cognizant** excels in healthcare digital transformation and integrating AI seamlessly. The company's TriZetto platform streamlines payer and provider processes, minimizing revenue leakage for prioritized clinical patient care.

### EXL

**EXL** offers digital operations with streamlined automation, a patient engagement platform for personalized care and the EXL Smart Platform for Health, improving payment accuracy for providers and payers.

### HCLTech

**HCLTech** prioritizes personalized patient experiences, remote monitoring and analytics-driven care through platforms such as hDiGix, VCareX, connected assets in regulated environment (CARE) platform and the HCL Actian Data Platform. It is known for its tailored EHR solutions.

### Infosys

**Infosys**' Helix innovates healthcare dynamics with efficient payer platforms, emphasizing engagement. Excelling in end-to-end health experiences, it proactively manages providers, delivering a transformative impact in the healthcare sector.

### NTT DATA

**NTT DATA** leads in healthcare data solutions with its digital accelerator for payers and providers. Its Nucleus for Healthcare (NFHC) platform uses FHIR-based models, while Clinical Language Pro (CLP) uses NLP and AI, both signifying significant advancements in healthcare data management.

### Optum

**Optum** transforms healthcare with the Optum One intelligent platform for providers. The Care Coordination Platform optimizes member care. The acquisition of Change Healthcare helps Optum streamline processes for payers and providers, marking a pivotal step in healthcare innovation.

**TCS** innovates healthcare with precise care through platforms for areas such as healthcare analytics and digital enrollment. Health and Wellness, its member engagement platform, provides personalized virtual care through TCS' seamless interoperability and data analytics using TCS Data Integrator and BITS.

**Wipro** leads healthcare innovation with versatile, scalable and secure patient-centric solutions. It provides extensive support services, partnering with Epic for implementation, integration and support. Its Complete Care solution promotes collaboration among stakeholders.

Leader

“NTT DATA is empowering payers and providers for precision and efficiency by shaping healthcare’s future with seamless data integration.”

*Rohan Sinha*

# NTT DATA

### Overview

NTT DATA is headquartered in Tokyo, Japan and operates in more than 80 countries. It has more than3,30,000 employees across global offices. In FY23 the company generated JPY 3,490.2 billion in revenue. In FY 2023, the company achieved financial success, reporting revenue exceeding $26 billion. NTT DATA’s commitment to innovation and excellence is evident in its healthcare platform meticulously designed to cater to the unique needs of both payers and providers.

### Strengths

**Healthcare data solutions for payers and providers:** Centered on healthcare data, NTT DATA offers Nucleus for Healthcare, its digital accelerator, incorporating Business Insight Engine (BIE), its digital health platform (DHP) and medical cost manager (MCM) that ensures payment integrity by offering capabilities such as claims editing, overpayments identification and coordination of benefits. This comprehensive suite delivers an extensive array of integration, interoperability and data services tailored for both payer and provider clients.

**Digital framework transforming healthcare:** A notable NTT DATA strength is its cloud-hosted Nucleus for Healthcare (NFHC) platform designed for providers. This robust platform supports care at home, patient experience and GenAI. With strengths in FHIR-based healthcare data, integration, interoperability, advanced device support, workflow automation and data fabric, NFHC offers consolidated visualizations and showcases versatility across various use cases.

**Elevating healthcare data:** NTT DATA employs its proprietary Clinical Language Pro (CLP) to transform unstructured clinical information, such as physician notes and lab reports, into structured data. Using a combination of NLP and AI, CLP processes standard coded insights for tasks such as medical reviews, risk adjustment analysis, quality measure reporting and identifying fraud, waste and abuse.

### Caution

Comprehensive training is essential for maximizing the benefits of NTT DATA’s versatile platforms such as NFHC. Ensuring adequate user training programs and a carefully planned adoption strategy is crucial for a smooth transition and overcoming potential resistance to new healthcare data solutions.

# Appendix

The ISG Provider Lens™ 2023 – Healthcare Digital Services study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of December 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Healthcare Digital Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

  

*Lead Author*

## Rohan Sinha
**Principal Analyst**

Rohan Sinha is a seasoned professional with over a decade of experience as an analyst in the healthcare and life sciences industries. He has been at the forefront in offering strategic guidance to industry CIOs, leveraging a wealth of published research and extensive interactions with industry stalwarts.

His work has been instrumental in shaping the strategies and decisions of organizations in these critical industries. Rohan also possesses a keen interest in the world of AI and GenAI, where he continually explores the significant impact of these cutting-edge technologies on the said industries.

Rohan currently is a Principal Analyst at ISG, where his role includes handling IPL reports related to the healthcare and life sciences domains.

*Research Analyst and Author,*
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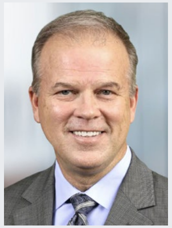
## Sneha Jayanth
**Senior Research Analyst**

Sneha Jayanth is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Healthcare, Procurement service and platform, FAO and other custom research. She has six years of experience conducting ICT related research and writing thought leadership content within various industries. In her previous role, she handled market analysis, and market intelligence and authored reports focusing on the latest technologies like IoT, AI, cloud, and blockchain.

She has also worked in a thought leadership division in the ICT industry managing blogs, reports, whitepapers, and case studies. She is responsible for writing enterprise content and the global summary report, which includes market trends and insights relevant to the border customer landscape.

*IPL Product Owner*



## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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**DECEMBER, 2023**

**REPORT: HEALTHCARE DIGITAL SERVICES**