Healthcare Digital Services

Provider Digital Transformation Services

Unveiling competencies of providers in the healthcare digital transformation space

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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.

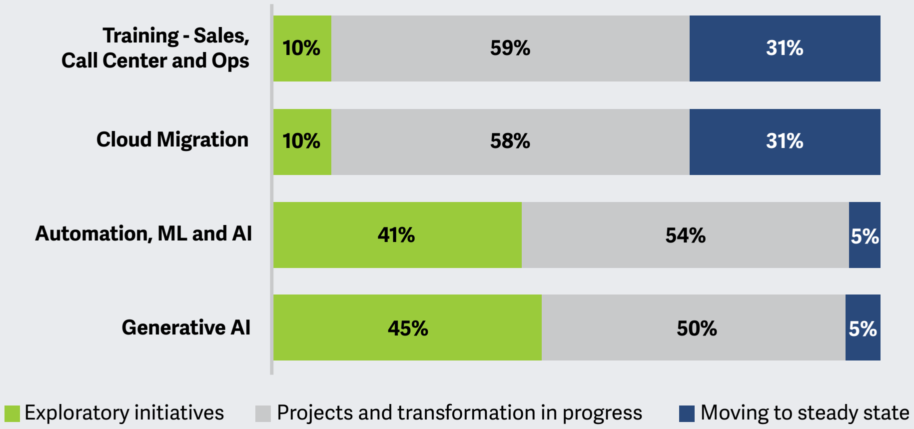
Transforming healthcare through integrated platform innovations

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

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	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

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	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.

Provider Digital Transformation Services

Who Should Read This Section

This quadrant report is relevant to healthcare provider enterprises across the U.S. for evaluating service providers offering digital transformation services to improve patient and member services.

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

Healthcare providers embrace advanced technologies for quality care. In the dynamic landscape of regulations, evolving technology and diverse market needs, service providers must stay informed and act strategically in the U.S. healthcare market. Industry progress has shifted focus from delivering quality care to prioritizing overall patient experience and achieving enhanced outcomes, marking a new agenda in the market.

In the U.S., healthcare providers prioritize widespread implementation of electronic medical record/electronic health record (EMR/EHR), solutions tailored for the payvider space, substantial investments in AI and analytics and the digitalization of administrative processes. A commitment to security and regulatory compliance underpins these initiatives.

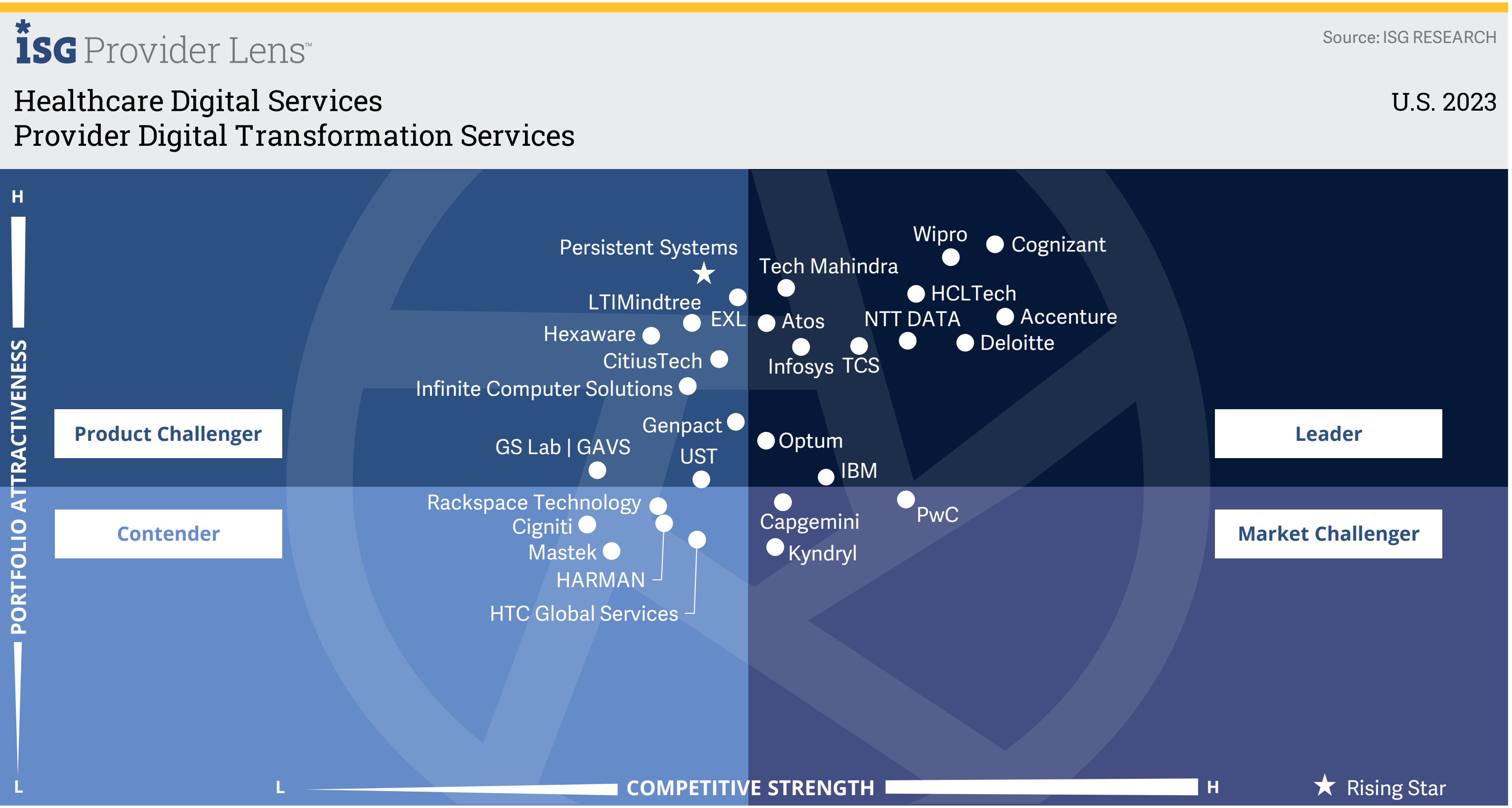
In the U.S., service providers assist healthcare enterprises in meeting current demands and anticipating future shifts. They cultivate skilled resources, drive strategic innovations and forge partnerships to deliver exceptional services across the provider spectrum. In U.S. healthcare, leaders provide cutting-edge solutions and cultivate a robust and resourceful ecosystem, prioritizing quality and elevating overall efficiency.

Digital professionals should read this report to understand digitalization in the U.S. healthcare sector and how top players enable efficiency and effectiveness across provider operations.

Industry practitioners should read this report to understand providers' relative positioning and competitive strength to effectively plan and select appropriate digital services and solutions.

Technology professionals should read this report to understand the technology landscape of U.S. healthcare and understand how providers leverage cutting-edge technologies to meet market needs.

Cybersecurity professionals should read this report to understand providers' security adherence without compromising patient privacy and delivering tailored security for healthcare providers.



This quadrant evaluates service providers that offer **digital transformation services to healthcare** providers in the U.S., **focusing on patient experience and engagements**, care delivery, modernization and value-based care (VBC).

Sneha Jayanth

Definition

Provider digital transformation services pertain to the capabilities of service providers in digitally transforming healthcare providers, encompassing both hospital systems and independent healthcare providers. These service providers assume responsibility for various crucial processes and systems associated with patient relations and care. This encompasses patient intake, physician referral management, ambulatory and chronic care, and post-acute care, which are pivotal in delivering high-quality healthcare services. Digital transformation services provided by these entities extend to employee centric systems, including information portals, scheduling tools and collaboration platforms.

These solutions for employees aim to heighten operational efficiency and streamline communication within healthcare organizations. As a result, they contribute to an improved standard of patient care and overall organizational performance. By harnessing digital technologies, these service providers empower healthcare providers to optimize.

Eligibility Criteria

1. **Ability to plan, develop and implement consumer-grade interfaces** of hospital and office systems and patient information and monitoring sources, including mobile apps for wellness, medical reference and fitness
2. **Offer guidance on selecting and deploying telehealth solutions**, including cybersecurity measures
3. **Established or emerging basic or standard relationships with trusted partners**, including academia and emerging firms, with new models of care delivery
4. **Ability to advise on workforce development**, including upskilling, to support digital and private data protection
5. **Consulting on developing models using AI, generative AI and analytics** for patient data analytics, screening, enhanced diagnostics and individualized treatment
6. **Capabilities in the modernization of provider systems**, including cloud migration, IoT, networking, data center consolidation and application portfolio management
7. **Experience in large transition projects** that include consolidation of merged companies and the modernization of systems and applications

Observations

For this study healthcare providers include hospitals, doctors' offices, clinics, labs and testing facilities. In the U.S., providers face ongoing challenges in the dynamic technology landscape, legacy infrastructure, adhering to federal regulations and security mandates and demand for a skilled workforce. Healthcare has drastically fluctuated due to socio-economic and political developments, leading to significant demands and changes. These changes have resulted in evolving digital health solutions that aim to improve access to quality healthcare.

Leaders in this quadrant have achieved notable growth in provider healthcare digital services. The most common care delivery witnessed across top players in the market are digital front door, revenue cycle management, investment in AI and automation, payvider convergence, advancing platform capabilities, extensive growth in electronic medical record (EMR)/ electronic health record (EHR) implementation and remote and virtual patient monitoring. However, all providers in this quadrant meet the eligibility criteria and could be suitable for a healthcare provider seeking service providers with specific strengths.

Compared to the IPL 2022 study, the Provider Digital Transformation Services quadrant in the 2023 study has several new entrants, including Kyndryl and Mastek. The 2023 report reflects minor position movements among those included in both years' studies. Many, if not most, provider-client relationships within this quadrant are long-term. The shifts are mainly due to expanded incumbent relationships and partly due to providers taking clients from one another.

From the 39 companies assessed for this study, 29 have qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture facilitates a comprehensive digital transformation for healthcare providers by enhancing their end-to-end digital capabilities while managing data and security. It streamlines enterprises, optimizing processes and enhancing overall operational efficiency.

Atos

Atos OneCloud for healthcare supports implementing EMR/EHR solutions to the cloud while implementing hybrid approaches as required. Atos applies its notable security portfolio to protect vital services and healthcare information.

cognizant

Cognizant offers digital transformation for providers based on holistic development that targets transformation from the front office to the back office. Its transformation efforts are focused on two digital domains — proprietary products and digital enablement services.

Deloitte

Deloitte provides advisory, implementation and operation services to healthcare clients. Its global network offers a cost-effective alternative to dedicated onsite support by providing talented resources in a flexible support model to meet clients' unique requirements.

HCLTech

HCLTech's remote patient monitoring and virtual care enhance post-visit interactions. Patients stay healthy with care plans, report allergies, adhere to medications, follow up with specialists and improve discharge comprehension, boosting health literacy.

IBM

IBM fuels healthcare transformation with smart architecture, updated core systems, open standards adoption and scaled data value. Secure platforms are crafted for enterprise-wide data and AI requirements, advancing the industry's technological landscape.

Infosys

Infosys drives healthcare evolution by refining revenue cycle management (RCM) platforms and coaching in design thinking. Prioritizing patient experience and outcomes, Infosys adopts agile digital scaling, revitalizes the core, reskills staff and expands localization in its strategy.

NTT DATA

NTT DATA excels in orchestrating large-scale, secure and efficient enterprises. It leverages cross-industry expertise to provide healthcare-specific solutions that scale to clients' needs, while enhancing quality.

Optum

Optum offers human-centered design and creates user-friendly healthcare technology and programs. It leverages analytics capabilities on a platform, as a service and via managed and transformational services.

TCS

TCS revolutionizes healthcare, engaging patients across diagnostics, treatment and more. It delivers solutions beyond traditional settings, prioritizing data, interoperability and person-centric care. This enhances patient experience and facilitates in-depth outcomes and engagement.

Tech Mahindra

Tech Mahindra uses technology-enabled strategies for integrated experience and enhancing value-based care. Its core offerings include automation, CRM, managed applications, infrastructure, onsite support and management consulting and strategic services.

Wipro

Wipro empowers clients with digital transformation support, available anytime-anywhere. It offers video infrastructure, medical gateways, decision analytics and remote patient monitoring to enable coordination among clinical staff. This reduces hospital visits while ensuring continuous monitoring for patients.

Persistent Systems

Persistent Systems (Rising Star) leverages partner ecosystems to transform healthcare organizations by facilitating data access, patient-clinician engagement, quality care delivery and improved financial performance.

NTT DATA

Leader

"NTT DATA's patient-centric solution integrates Nucleus for Healthcare, a connected care platform, and expert consulting to optimize efficiency and enhance patient outcomes."

Sneha Jayanth

Overview

NTT DATA is headquartered in Tokyo, Japan and operates more than 80 countries. It has more than 3,30,000 employees across global offices. In FY23 the company generated JPY 3,490.2 billion in revenue.NTT DATA leverages patient-centric solutions and connected care platforms, scaling to meet client needs while reducing costs and enhancing quality. NTT DATA focuses on delivering value-based patient outcomes, creating exceptional experiences and transformative medical delivery.

Strengths

Patient-centric solutions: NTT DATA, in collaboration with partner solutions, offers a comprehensive integration and user experience and deliver end-to-end solutions for the provider care continuum. It combines extensive expertise in orchestrating large-scale, secure and efficient enterprises with specialized healthcare solutions such as Nucleus for Healthcare and Business Insights Engine.

Connected care platform: NTT DATA's Nucleus for Healthcare serves as a unified platform that combines data integration, automation and AI. The platform, offering a comprehensive 360-degree view, enhances consumer visibility. Encompassing critical facets such as consumer engagement, patient access, care delivery, revenue cycle management and population health, this solution is pivotal in advancing transformative initiatives within the healthcare landscape.

Expert consulting and advisory: NTT DATA's proficient healthcare consultants specialize in optimizing revenue, reducing costs and enhancing efficiency and interoperability. Their focus on creating efficiencies across the healthcare ecosystem translates to improved patient outcomes. This involves workforce integration, data automation, streamlined clinical and business operations and a simplified, enhanced healthcare journey.

Caution

NTT DATA could consider expanding its presence in the U.S. market by establishing additional delivery centers. The expansion could enhance its market position and contribute to its sustained growth. Its current broad solution across the provider value chain could attract a more diverse clientele within the U.S. provider spectrum.

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.

Lead Author:
Rohan Sinha

Co-Lead Author:
Sneha Jayanth

Editor:
Priyanka Richi

Research Analyst:
Sneha Jayanth

Data Analyst:
Lakshmi Kavya Bandaru

Consultant Advisors:
James Burke, Shayne Yeager and SG Anand

Project Manager:
Sonam Khanna

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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.

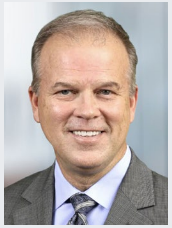
Research Analyst and Author,
Provider Digital Transformation Services

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.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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