

Healthcare Digital Services

Provider Digital Transformation Services

A research report comparing provider strengths,
challenges and competitive differentiators

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Digital services improve health outcomes and business results

The COVID-19 pandemic has caused 1.6 million deaths in the U.S. as of this writing. While death rates are falling, the physical and mental consequences for individual health outcomes will continue for decades. Long COVID-19 symptoms might last a lifetime, while much remains unknown about longer-term health effects. As was the rest of the society, the U.S. healthcare system was unprepared for the rapid change in demand for care, hospital beds, equipment and personal protective equipment (PPE). The industry is making changes to respond to the disease and to accommodate the increasing demand for healthcare services. Digital transformation and IT services are helping stakeholders in all parts of the healthcare ecosystem deal with the present and be future ready.

Among the service providers we communicated with, we repeatedly heard they are meeting clients where they are, rather than pushing specific agendas. Where they are, from a technology perspective, is reflected in recent ISG research that shows relatively low levels of adoption for many technologies (Figure 1).

Where the healthcare organizations are headed is reflected in the industry trends that emerge from this research:

- Increasing focus on health equity
- Industry convergence and interconnection
- Better stakeholder experiences
- IT modernization to reach desired outcomes
- Evolving economics of healthcare

U.S. healthcare industry is slowly evolving to face complex challenges.



Increasing focus on health equity

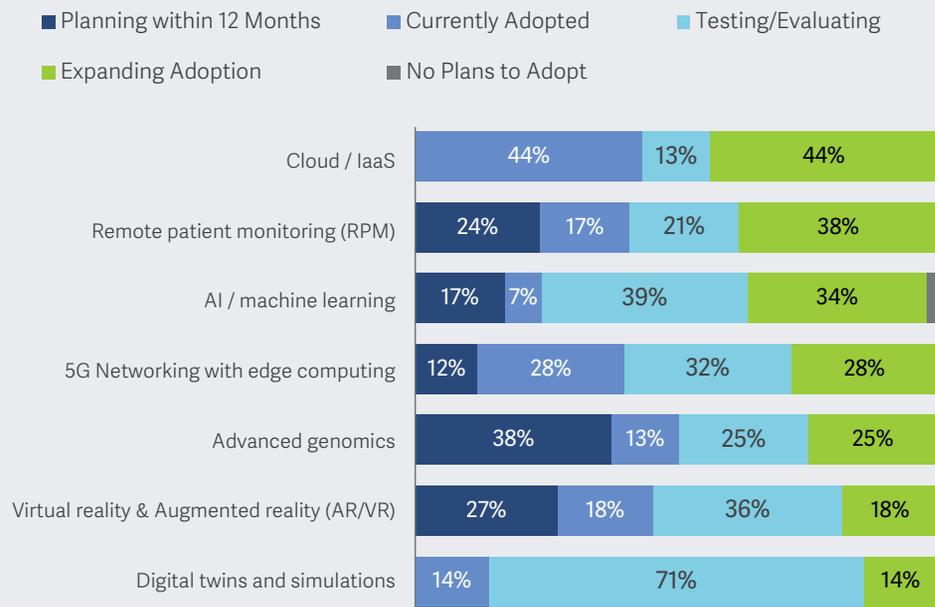
People and institutions in the U.S. are driving the healthcare industry to focus on equity and recognition of the social determinants of health (SDOH). Traditional company roles are no longer relevant. Payers are moving beyond benefits administration to sharing the responsibility of overall health with their members. Favorable health outcomes start with behavior change. Providers see how health is affected by everything that people do. They are also challenged to proactively identify people who are the most vulnerable. Thus, they seek ways to engage and interact at homes, workplaces and in the broader community, leading to an increased focus on using electronic medical records (EMRs) and SDOH through descriptive and predictive analytics, machine learning and NLP. Public health promotion programs

and self-care awareness are critical to improving individual and population health outcomes.

At the same time, there is a desire to treat individuals as unique. Awareness of behavioral and mental health is higher now, leading to a recognition of the need for proactive care. An increased focus on treating people as individuals drives uses of advanced data models and algorithms for early diagnosis and prevention. Integrated health uses a whole-patient approach while incorporating knowledge from SDOH.

Payers use a growing number of value-based care (VBC) agreements because Medicaid and Medicare programs provide incentives and rewards for positive health outcomes. Reluctant providers are slowly accepting both upside and downside risks. The transition from fee-for-service to VBC increases the focus on wellness, prevention, early detection and

Figure 1: Technology Adoption Status



Source: ISG Research 2022 Healthcare and Life Sciences Survey



the management of chronic and acute diseases. VBC remains a small but growing portion of the healthcare business.

Industry convergence and interconnection

Payers and providers are crossing into each other's traditional businesses. The value proposition of health plans is eroding while providers consolidate to face threats from new entrants. Large healthcare players, such as Anthem, CVS and UnitedHealth Group, invest more in acquisitions and models such as "payviders." Some payers are diversifying by acquiring their hospitals, while providers are adopting insurance models. Consumers of healthcare services seek unified consumer experiences. Payers want to connect to patient EMRs, usually for use cases such as prior authorization and complex case management. Providers use APIs to exchange data with online

portals and mobile apps that help them have a complete view of their patient health data.

The need to better connect with the healthcare ecosystem is leading to a focus on improving data management and governance; integrating payer and provider systems is one of the most dynamic aspects of the healthcare market today. Integration and cooperation between payers and providers are essential to improve disease prevention and to have a better focus on therapies that deliver better health outcomes.

To enable this convergence, along with compliance with government mandates, a seamless flow of clinical and non-clinical information must occur across the healthcare ecosystem. When health information systems are better integrated, payers can develop an enhanced understanding of their utilization rates and better demand for services.

Better stakeholder experiences

Healthcare in the U.S. continues to receive low customer satisfaction ratings, according to research from the American Customer Satisfaction Index. Healthcare consumers and employees seek:

- Improved access to doctors and hospitals
- Better call center services
- More insurance plans with price transparency
- Easier claims submission
- Timelier claims processing

People want to be active participants in their healthcare and coordination. They expect a multi-touch, digitally enabled healthcare experience that demands the payer segment to aggressively move toward a technologically advanced

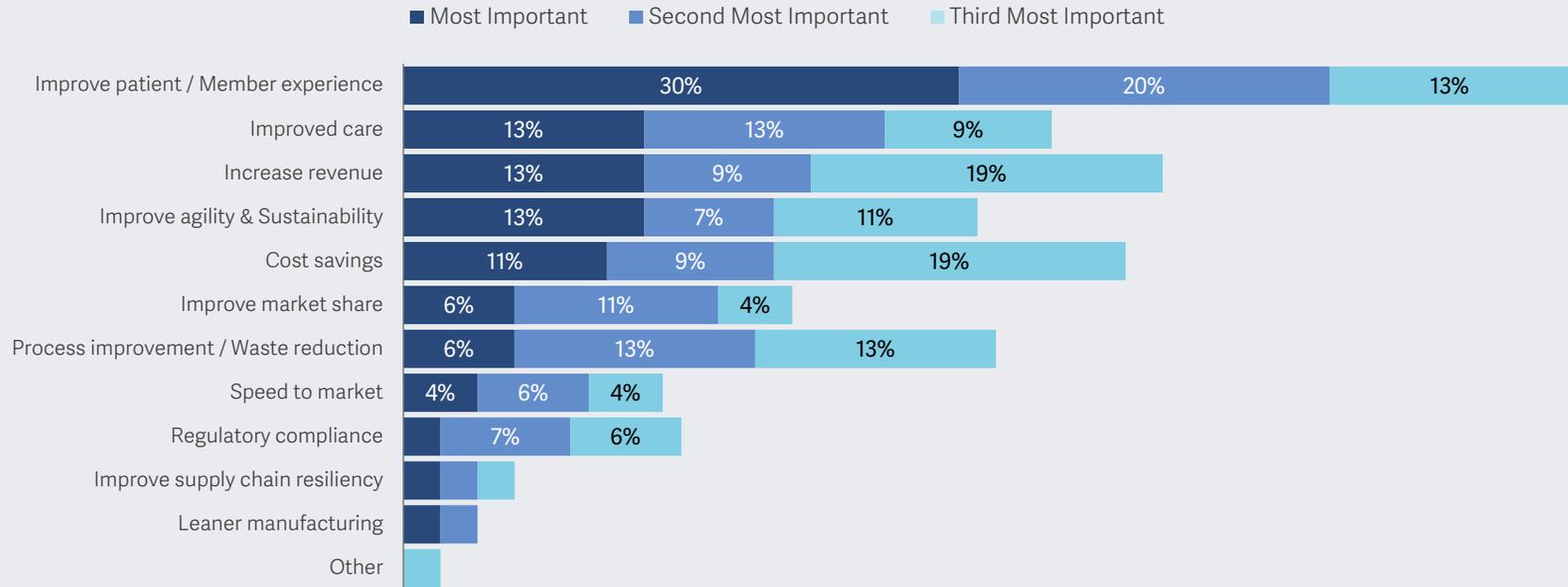
service model. For example, people contacting member services expect their representatives to have access to all their information and historical data from past inquiries. They also expect online access or access via a mobile app.

To meet consumer expectations, there is an increase in the number of digital engagement initiatives enabling virtual care and personalization of care (Figure 2). A shifting population mix, along with unprecedented consumer acceptance and desire for digital engagement during the pandemic, boosted the demand for modern experiences in the healthcare sector. Changing care delivery is also driven by the entry of big technology and retail companies into the market. Legacy providers are changing their business models to compete better.

Another driver of experience change is the trend of care moving from hospital walls into ambulatory and home settings. Virtual



Figure 2: Top 3 Transformation Motivations



Source: ISG Research 2022 Healthcare and Life Sciences Survey



care gained significant traction during the pandemic, and the momentum continues with telemedicine, remote patient monitoring, digital therapeutics and home care services. Payers and providers are revamping their online portals to become self-service digital front doors, implementing chatbots and mobile apps for improved engagement. Physicians and patients continue to embrace virtual solutions and resulting benefits in terms of access, cost and health outcomes.

IT modernization to reach desired outcomes

Digital transformation requirements are driving IT modernization spending in healthcare. Improving healthcare enterprises' legacy architecture or decreasing technical debt through modernization is helping enterprises address interoperability challenges, poor data quality and lower operational costs (Figure 3).

Meanwhile, part of modernizing involves using the cloud for data sharing and protection. In healthcare, there is a preference for hybrid or private clouds over the public cloud, especially because of the anticipated cost savings and ease of use associated with the hybrid or private cloud. As a result, there is increased demand for multicloud adoption and monitoring tools for management. There are differences within the industry in the adoption of and proficiency with cloud technology for managing healthcare data. Due to legacy investments, several firms in the healthcare sector have stayed digitally inactive. These old infrastructure systems may not have the scalability and flexibility needed to handle the data explosion occurring across client ecosystems, even though they appear to be tied to earlier investments.

AI and analytics speed up digital transformation, which results in better patient care and experiences. Automation

improvements using AI, machine learning and RPA affect core process optimization as well as automatic approvals and related initiatives for prior authorization and claims processing. The adoption of advanced analytics is also spurring innovations in:

- Population health
- Revenue cycle management (RCM)
- Payment integrity
- Member and patient engagement
- Application of human genomic data

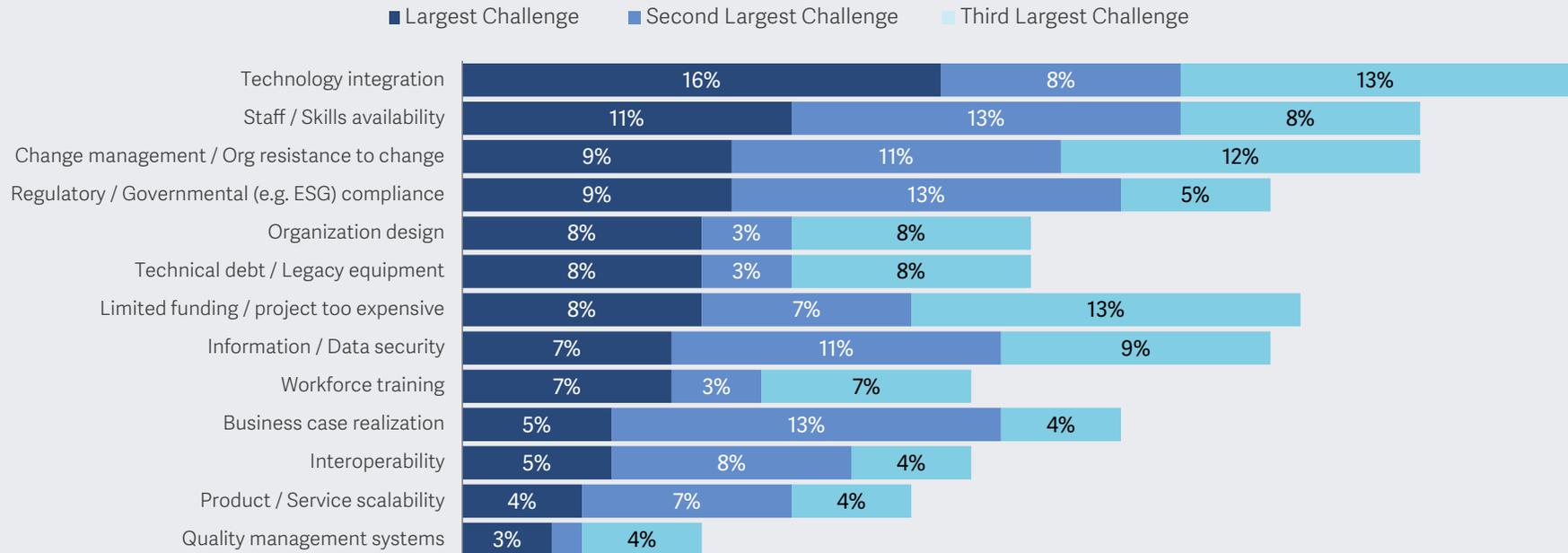
Furthermore, AI and analytics enable new mobile capabilities in healthcare, including consumer engagement via mobile devices such as wearables. However, these need proper data management foundations as well as clinical and operational business intelligence competencies to enable data-driven decision-making.

Another trend in the healthcare sector in the U.S. is the integration of AI and machine learning into legacy-rule-based workflows to ease administrative functions. Workflow automation helps ensure staff well-being, task quality and cost management efficiency and lessens challenges such as staffing shortages and an aging workforce. Precision medicine uses digitally enabled prescriptions supplemented with analytics and virtual platforms to improve diagnostics and prognostics.

Cybersecurity remains a top focus because of the nature and value of medical records and other personal data, including digital health data, interoperable data and customer engagement data. The WannaCry ransomware reportedly hit 40 percent of healthcare organizations. Furthermore, Internet of medical things (IoMT) wearable and implantable devices constantly feed sensitive patient data. The U.S. FDA recently directed stricter cybersecurity guidelines for device makers.



Figure 3: Top 3 Transformation Challenges



Source: ISG Research 2022 Healthcare and Life Sciences Survey



A HIMMS survey shows that 59 percent of healthcare organizations increased their cybersecurity budgets this year, compared to last year.

Evolving economics of healthcare

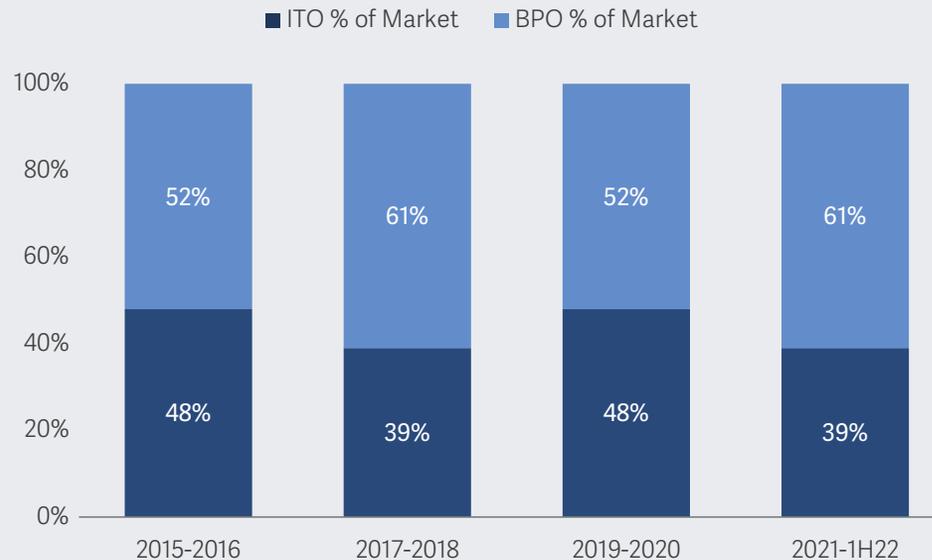
Demographic shifts and lifestyle changes, inflation and the pandemic continue to add cost pressure to healthcare ecosystems. Rising costs are leading to the need for cost optimization and workforce transformation. There is a growing focus on operational efficiencies, which encourages the adoption of cloud, process automation and application modernization initiatives, including mobility and remote workforce management.

The current adverse economic environment means modest to flat growth for commercial plans. Payers look to increase the member lifetime value, and government plans are expected to grow,

including both Medicare Advantage, due to an aging U.S. population, and Medicaid, with factors such as a rise in unemployment. Moreover, healthcare organizations are giving higher priority to environmental, social and governance (ESG) goals and measures. To deal with these economic changes, the healthcare delivery model is seeking operational improvements enabled by digital transformation.

Meanwhile, government mandates and regulations are driving digital projects. In the U.S., the Office of the National Coordinator for Health Information Technology (ONC) and the Centers for Medicare & Medicaid Services (CMS) have created structured data standards and other mandates that electronic health records (EHRs) must adhere to. CMS and ONC guidelines require that patients have access to their healthcare data and provider directories via APIs. The No Surprises Act is meant to prevent

Figure 4: Healthcare Market Split: ITO vs. BPO



Source: ISG, 2022; Awards with > \$5M Annual Contract Value



Executive Summary

surprise medical bills. There are also new regulations on interoperability address security; payer-to-payer data exchange; and admission, discharge and transfer event notifications.

Foreseeing the potential for a recession, healthcare leaders are aggressively pursuing effective cost optimization strategies, which reflects:

- A continual drive for better patient experiences and engagements
- Judicious cost increases
- Restructuring cost for effective allocation
- Applying agile methodologies
- Some strategic cost takeout measures
- Leveraging industry cloud platforms

This study evaluates the service providers working with U.S. healthcare payers and providers. Over time, as ISG Index data illustrates below, there has been a shift to a higher percentage of business process outsourcing (BPO) deals than IT outsourcing (ITO).

Healthcare expertise and tools are essential to digital services.



Provider Positioning

Page 1 of 4

	Payer Digital Transformation Services	Provider Digital Transformation Services	Healthcare Interoperability Services and Solutions	Value-based Care Services and Solutions
Accenture	Leader	Leader	Not In	Leader
Atos	Product Challenger	Leader	Product Challenger	Contender
Capgemini	Product Challenger	Market Challenger	Leader	Market Challenger
CitiusTech	Product Challenger	Product Challenger	Leader	Rising Star ★
Coforge	Product Challenger	Not In	Product Challenger	Contender
Cognizant	Leader	Leader	Leader	Leader
Conduent	Product Challenger	Not In	Product Challenger	Not In
Deloitte	Rising Star ★	Product Challenger	Leader	Leader
emids	Product Challenger	Product Challenger	Not In	Not In
EXL	Leader	Product Challenger	Product Challenger	Not In



 Provider Positioning

Page 2 of 4

	Payer Digital Transformation Services	Provider Digital Transformation Services	Healthcare Interoperability Services and Solutions	Value-based Care Services and Solutions
Firstsource	Leader	Not In	Not In	Not In
GAVS	Not In	Product Challenger	Contender	Not In
Genpact	Product Challenger	Product Challenger	Market Challenger	Market Challenger
HARMAN	Not In	Contender	Product Challenger	Contender
HCLTech	Leader	Leader	Leader	Market Challenger
Hexaware	Product Challenger	Rising Star ★	Not In	Not In
Hitachi Vantara	Not In	Product Challenger	Not In	Not In
HTC Global	Contender	Contender	Contender	Market Challenger
IBM	Market Challenger	Leader	Not In	Not In
Infinite	Product Challenger	Product Challenger	Product Challenger	Product Challenger



 Provider Positioning

Page 3 of 4

	Payer Digital Transformation Services	Provider Digital Transformation Services	Healthcare Interoperability Services and Solutions	Value-based Care Services and Solutions
Infosys	Leader	Leader	Leader	Leader
LTIMindtree	Leader	Product Challenger	Rising Star ★	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Leader	Leader
Optum	Leader	Leader	Not In	Leader
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Product Challenger
PWC	Market Challenger	Market Challenger	Market Challenger	Not In
Quantiphi	Not In	Not In	Not In	Contender
Rackspace	Not In	Product Challenger	Not In	Not In
Sutherland	Contender	Contender	Not In	Not In



 Provider Positioning

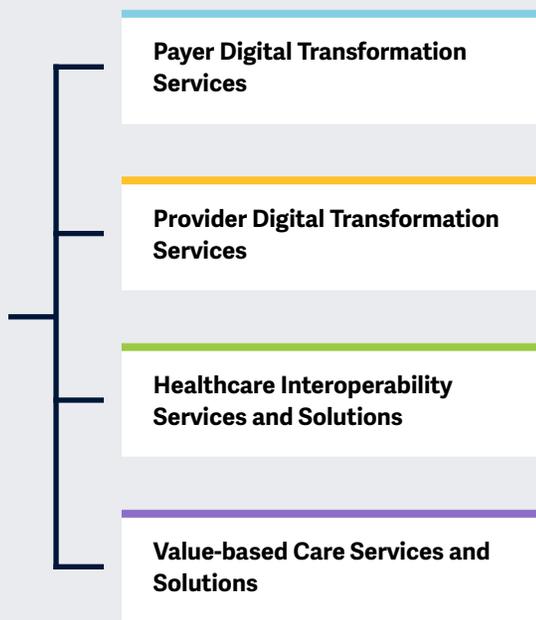
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	Payer Digital Transformation Services	Provider Digital Transformation Services	Healthcare Interoperability Services and Solutions	Value-based Care Services and Solutions
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Leader	Leader	Product Challenger
UST	Leader	Product Challenger	Product Challenger	Not In
Virtusa	Not In	Not In	Contender	Market Challenger
Wipro	Leader	Leader	Leader	Leader
WNS	Contender	Not In	Not In	Not In



This study focuses on significant Digital Services in Healthcare.

Simplified Illustration Source: ISG 2022



Definition

The healthcare industry continues to be under pressure from customers, governments and other stakeholders to increase investments. The pandemic continues to affect industry practices. The public seeks better healthcare outcomes at lower costs, price transparency, appropriate data sharing and access to their own records. The U.S. healthcare industry must comply with new regulations and engage in mergers and acquisitions while adapting to the needs of an aging population. Furthermore, consumers expect advanced and convenient digital service delivery across the care continuum. Many companies and government agencies struggle to stay apace with the growing demand for their services, and in the private sector, they struggle to deal with the mounting competitive pressures.



Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants: Payer Digital Transformation Services, Provider Digital Transformation Services, Healthcare Interoperability Services and Solutions, and Value-based Care Services and Solutions.

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
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market 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 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.

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.

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.

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

Provider Digital Transformation Services

Who Should Read This

This quadrant report is relevant to healthcare providers across the U.S. for evaluating service providers offering digital transformation services to deliver better care, improve operations and enhance user experience.

In this quadrant, ISG highlights the current market positioning of service providers that offer digital transformation services to healthcare providers in the U.S. and shows how each of these service providers enables healthcare providers to improve patient experience and build a care delivery system that strengthens their client relationships.

Healthcare providers are accelerating technology adoption and providing high-quality care to patients. With more consumerization, automation and consolidation of health systems, they have realized that running a care system is not

just about patient treatment but is also about enriching patient experience and driving improved health outcomes.

In the U.S., providers focus on healthcare digital transformation services that deliver personalized quality care, enhance clinician productivity, automate administrative tasks and improve patient management. They also incorporate technologies such as AI, analytics, machine learning, the cloud, data integration and security to provide convenience to users.

In the U.S., leading service providers support healthcare providers to address ongoing challenges and prepare them for the upcoming shifts in the market. At the same time, healthcare providers look for service providers, with digital capabilities, that can address market and regulatory challenges and offer an end-to-end, sustainable solution.



Business professionals should read this report to understand the relative positioning and capabilities of providers and thus effectively plan and select appropriate digital services and solutions. The report also shows how the technical and integration capabilities of a service provider are compared to the rest of the market.



Digital professionals should read this report to develop a better understanding of the current landscape of service providers' digital transformation offerings and understand how each of the providers have leveraged the latest technologies to meet healthcare providers' needs in the U.S market.



Technology professionals should read this report to understand how providers of healthcare digital transformation services fit in their digital transformation initiatives and how they are compared with one another.



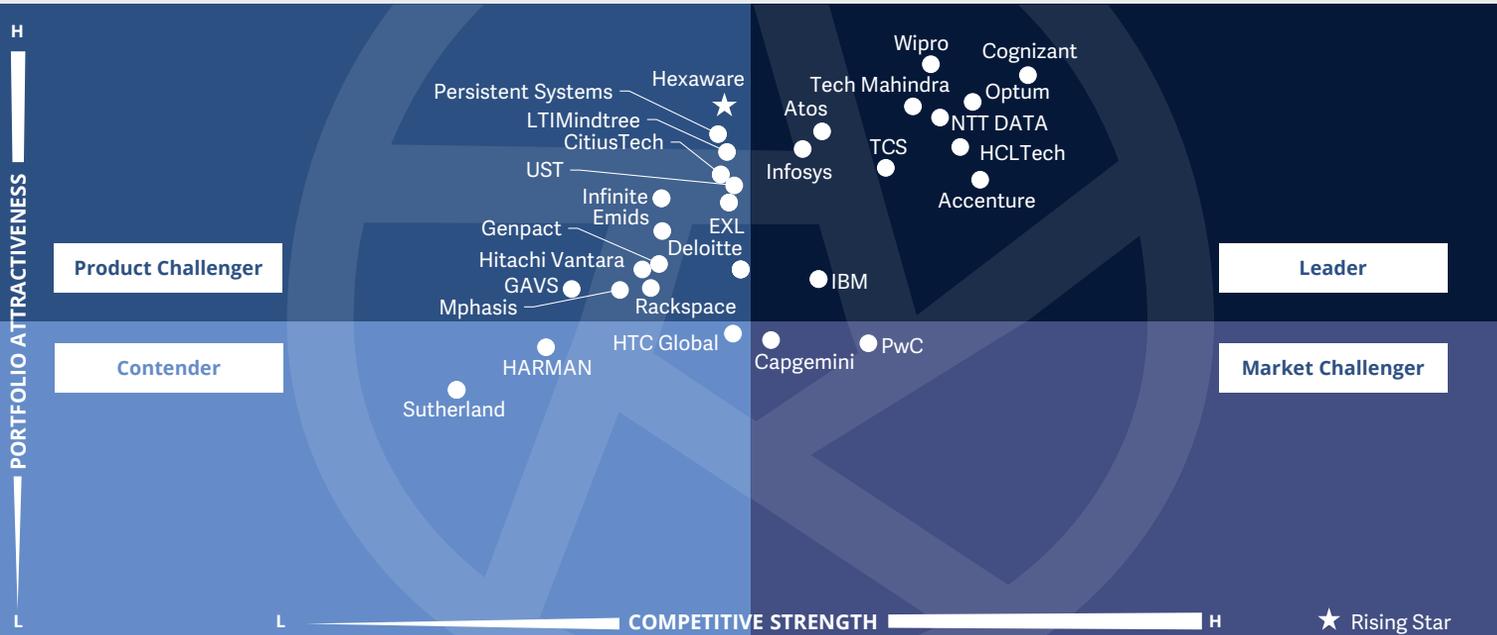
Cybersecurity professionals should read this report to understand how service providers address the significant challenges of compliance and security, without compromising on patient privacy and experience.



ISG Provider Lens™
 Healthcare Digital Services
 Provider Digital Transformation Services

Source: ISG RESEARCH

U.S. 2022



This quadrant evaluates service providers that offer **digital transformation** services to providers of healthcare in the U.S., with a focus on **patient experience, care delivery, modernization and financial improvements.**

Ron Exler



Provider Digital Transformation Services

Definition

Digital transformation helps to combat many of the ongoing and anticipated industry challenges. In the healthcare industry in the U.S., digital transformation of services helps provider segments evolve to better serve their constituents. Successful healthcare providers meet their challenges with the following:

- Driving targeted investments and continuous cost control
- Using advanced technologies and digital operating models
- Focusing on improved and innovative patient engagements
- Building, buying and improving data sharing processes and tools
- Shifting to digital platforms for rapid modernization and adjusting to the changing care environment

This quadrant assesses service providers that offer digital transformation services to healthcare providers such as hospital systems and independent healthcare providers. These providers should be responsible for processes and systems pertaining to patient relations and care, such as patient intake, physician referral management, ambulatory and chronic care and post-acute care. The services should also include employee systems such as information portals, scheduling and collaboration.

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. Capability to offer guidance on **selecting and deploying telehealth solutions**, including measures for cybersecurity
3. Established or emerging basic or standard relationships with **trusted partners**, including 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 the **development of models**, using AI and analytics **for screening, diagnostics and treatment**
6. Capabilities in the **modernization of provider systems**, including cloud migration, data center consolidation and application portfolio management experience in **large transition projects** that include consolidation of merged companies and the modernization of systems and applications



Provider Digital Transformation Services

Observations

Healthcare providers include hospitals, doctors' offices, clinics, labs and testing facilities. In the U.S., providers face ongoing challenges of staffing, profitability, billing and treatment quality. The COVID-19 pandemic has pushed these care institutions to their limits, leading to significant changes. Such adjustments include seeking technologies that can help address significant challenges.

Leaders in this quadrant have notable success in many types of healthcare provider environments, covering care delivery, revenue cycle management, digital front doors, cloud migration and automation. However, all the companies in the study meet the eligibility criteria and could be right for a healthcare provider seeking service providers with specific strengths.

Compared to the 2021 study, the 2022 study's quadrant has several new entrants, including Capgemini, CitiusTech, Hitachi Vantara, HTC Global, PwC and Rackspace Technology. The study reflects minor position movements among those included in both years' studies. Because many, if not most, provider-client relationships within this quadrant are long term, the shifts are mainly due to the expansion of incumbent relationships and partly due to providers taking clients from one another.

From the 39 companies assessed for this study, 30 have qualified for this quadrant, with 11 being Leaders and one a Rising Star.



Accenture helps add systems that allow healthcare providers to recommend digital services to patients and collect and interpret patient data from these services. It supports the consolidation of healthcare provider enterprise systems via cloud migration strategies, process streamlining and implementation.



Atos' OneCloud for healthcare supports the move of Epic and Cerner solutions to cloud, while implementing hybrid approaches as required. It offers a remote care platform for patient monitoring, scheduling and virtual meetings, while supporting decarbonization. Atos applies its notable security portfolio to protect vital services and healthcare information.



Cognizant helps providers better manage their financials with digital solutions that streamline and optimize revenue cycle management processes. Also critical is compliance with existing and new regulations, which Cognizant addresses with modernization, digital engineering and advanced analytics. Its consulting services include care model design, patient engagement and quality strategy.



HCLTech actively recruits people with healthcare provider experience to sustain client credibility and boost its delivery capabilities. The company provides independent consulting around cloud transformation, and clients can choose from different hyperscalers and technology solutions. Its ecosystem partnerships include AWS, Google Cloud and Microsoft Azure, as well as IBM (for the hybrid cloud).



Provider Digital Transformation Services



Hexaware (Rising Star) offers human-centered designs to help teams build patient-centric solutions. Such solutions reduce patient waiting times to schedule appointments, speeding up diagnoses and treatment. Hexaware developed a platform for CMS reporting that has a dashboard that captures and reports clinical quality measures. It enables faster identification of gaps in care.



Clinicians have access to any image, anywhere and anytime, via **IBM's** iConnect Enterprise Archive that gives a consolidated view of a patient's health record with integration to EHRs. This helps providers make more informed decisions for patients. IBM Cloud provides transformation services, with its healthcare expertise.



Infosys' domain experts help assess and select EMR capabilities and applications. It supports cloud migration and enhancement of revenue cycle management (RCM) platforms and provides coaching on design thinking. The Infosys Digital Health Platform (IDHP) focuses on transforming patient experience and health outcomes. Infosys hosts a healthcare center of excellence and a design lab and has partnerships with academia.



NTT DATA created a virtual hospital architecture that comprises systems of record, systems of insight, systems of engagement, devices, care delivery and logistics. Quality monitoring, ancillary services and program monitoring are embedded in workflows. Nucleus for Healthcare and Business Insights Engine supplement the company's domain expertise.



Optum starts at the business level, engaging executives with research and advisory services. Its analytics solution is embedded in its provider services, focusing on creating insights that improve health outcomes. It offers analytics capabilities on a platform, as a service, via managed services and through transformational services.



TCS works with healthcare providers to make clinical operations future ready with cloud services, data democracy and AIOps. It also helps transform legacy operations, such as revenue cycle management, claims and billing, into automated, proactive and predictive processes. TCS modernizes healthcare with patient-centric digital technologies, such as AI.



Tech Mahindra uses technology-enabled strategies for process automation and enhancing value-based care. Other services for providers are cybersecurity, EHR modernization, healthcare enterprise analytics and interoperability. Its core offerings include automation, CRM services, managed application services, contact center, infrastructure services, onsite support and management consulting and strategic services.



Wipro employs thousands of registered nurses to support patients and providers. It also has hundreds of medical coders. Wipro's Remote Patient Monitoring and Care Management solution is an integrated home-installed system with wireless data transmission. Its Product Healthcare Cloud is used for medical applications such as telehealth, virtual care and wellness.





“NTT DATA leverages high-quality solutions and services to address challenges faced by U.S. hospitals.”

Ron Exler

NTT DATA

Overview

NTT DATA is headquartered in Tokyo and operates in more than 55 countries. It has over 140,000 employees across 208 global offices. In FY22, NTT DATA was combined with NTT Ltd., under the name NTT DATA Inc., with total revenue exceeding \$30 billion. NTT DATA’s expertise and healthcare-specific solutions bring scale to clients’ needs, reducing their costs and increasing quality.

Strengths

Healthcare-specific solutions: Digital accelerator (Nucleus for Healthcare) and the NTT DATA Business Insights Engine supplement the company’s domain expertise. NTT DATA’s cross-industry offerings, such as Dynamic Workplace, bring scale to provider needs, targeting costs and quality.

Patient customer experience measurement and journey orchestration: NTT DATA works with providers to identify actionable customer insights with measurable business outcomes. There are different metrics at each stage of the patient journey captured into customer

experience KPIs, covering research, check-in, treatment, discharge, follow-up and loyalty.

Virtual hospital at home: As hospitals struggle to retain staff and face space constraints, moving people home for care becomes more important. With available and emerging technologies, NTT DATA created a virtual hospital architecture encompassing systems of record, systems of insight, systems of engagement, devices, care delivery and logistics. Quality monitoring, ancillary services and program monitoring are embedded in workflows.

Caution

In October, NTT Corp. and NTT DATA Corp. finalized the creation of NTT DATA and formally launched their combined international business. This creates a larger company and carries certain uncertainties for employees, partners and clients. Furthermore, NTT DATA must integrate its recent acquisitions, including Apisero, Aspirent, Chainalytics, Hashmap, Nexient, Postlight, Umvel and Vectorform. This takes time, which can slow the delivery of newly acquired benefits to clients.





Appendix

The ISG Provider Lens™ 2022 – Healthcare Digital Services 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 November 2022, 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



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Ron Exler is a principal analyst with the ISG Provider Lens (IPL) service, a part of ISG Research, leading IPL studies including Internet of Things (IoT) and Healthcare Digital Services. Ron has led product management at enterprise software companies, run enterprise research advisory services, and advised, built and deployed innovative technology inside large enterprises.

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Sneha Jayanth is a senior research analyst at ISG. She supports and co-authors Provider Lens™ studies on contact center, healthcare digital services, healthcare platform studies and procurement services and platforms.

She also provides enterprise perspectives and contributes to global summary reports. For ISG clients, Sneha offers expertise in technology, business and market research. She previously worked with a research firm specializing in IoT, cloud,

AI and analytics, delivering market intelligence and authoring reports. In various consulting projects, Sneha conducted market research, analyzed data, and collaborated with internal stakeholders to provide deep market insights to the clients.





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.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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. For more information, visit www.isg-one.com.





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