iSG Provider Lens™

Healthcare
Digital Services

Unveiling competencies of providers in the
healthcare digital transformation space

BROCHURE | AUGUST 2023 | U.S. AND U.K.

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With the convergence of technology and medicine, healthcare is transforming profoundly in the digital age. The public in the U.S. and U.K. continue 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. Meanwhile, the U.K. market grapples with post-Brexit complexities and constrained funding.
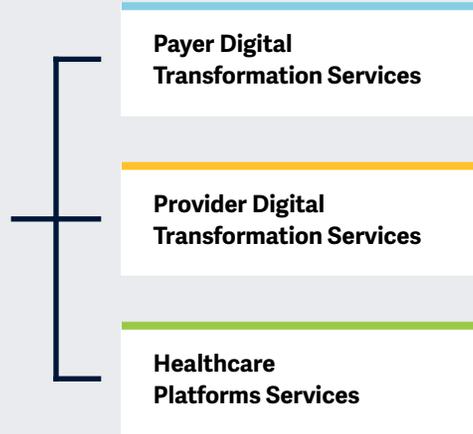
Advancements in digital health have brought a paradigm shift in how healthcare is accessed, delivered and experienced. From telemedicine and remote patient monitoring to analytics-based diagnostics and AI, digital healthcare solutions have emerged as powerful tools in improving access to care, enhancing 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 IPL 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.

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

Simplified Illustration Source: ISG 2023

**Payer Digital
Transformation Services**

**Provider Digital
Transformation Services**

**Healthcare
Platforms Services**

**The ISG Provider Lens™ Healthcare Digital
Services 2023 study offers the following to
business and IT decision makers:**

- Transparency on the strengths and
  weaknesses of relevant providers
- A differentiated positioning of providers
  by segments based on their competitive
  strengths and portfolio attractiveness
- Focus on different markets, including the
  U.S. and the U.K.

Our study serves as an important decision-
making basis for positioning, key relationships
and go-to-market considerations. ISG advisors
and enterprise clients also use information from
these reports to evaluate their current vendor
relationships and potential engagements.

Payer Digital Transformation Services

Definition

In the healthcare industry, payer digital transformation involves service providers offering specialized digital services to insurance plan companies in the U.S. and the U.K. These services are designed to assist payers in adopting a digital-first approach to enhance patient care. The objective is to empower insurance companies to effectively engage and serve their members through various digital channels, including computers, remote monitoring devices, smartphones and other mobile devices, for both statutory and private health.

However, the scope of these services extends beyond patient care, encompassing critical operational processes for payers, such as claims processing, member verification and enrollment. These service providers should streamline and optimize their operational aspects for their insurance companies to showcase their modernization capabilities.

The utilization of generative AI is a game-changer for the healthcare market. Generative AI has the potential to simulate novel concepts based on customer data, analyze individual patient information, recommend personalized treatment enhancements and simulate diverse patient health scenarios. Providers are facing increasing pressure to incorporate this technology into their services and develop strategies, components and applications based on generative AI models.

The overarching goal of payer digital transformation services is to elevate the efficiency and effectiveness of healthcare payment systems while harnessing opportunities offered by the digital landscape.

Eligibility Criteria

1. **Technology consulting** for **appropriate use of traditional and emerging healthcare technologies**, with the ability to plan, develop and implement consumer-grade interfaces for employee systems and member information sources, including mobile apps

2. Established or emerging basic/standard **relationships with trusted partners**, including academia and innovative startups

3. Provide **services for the digitalization of processes** while securely navigating **regulation complexities**

4. Offer **consultation services on developing models** using ML, AI, generative AI and analytics

5. Possess capabilities in the **modernization of payer systems**, including cloud migration, data center consolidation and application portfolio management

6. Experience in **large transition projects** that include consolidation of merged companies and modernization of systems and applications

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

their processes, elevate patient outcomes and cultivate a patient-centric approach across all operational aspects.

Generative AI has introduced transformative opportunities for healthcare providers, particularly in the analysis of patient data, diagnosis and personalized therapy. This revolutionary technology can help derive novel insights from patient data, facilitate accurate diagnoses and tailor therapeutic strategies for individuals. Its capability to design drug compositions and fine-tune treatments offers a customized approach to patient care. Simulating patient health outcomes can further refine treatment plans, promising enhanced health results.

Provider digital transformation services encompass service providers' modernization efforts for healthcare organizations, optimizing patient care processes and fostering employee efficiency. The integration of generative AI further revolutionizes patient data analysis and personalized treatments, enhancing healthcare outcomes.

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

Healthcare Platforms Services

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

Quadrants by Regions

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Healthcare Digital Services 2023:

Quadrant	U.S.	U.K.
Payer Digital Transformation Services	✔	✔
Provider Digital Transformation Services	✔	✔
Healthcare Platforms Services	✔	✔

The research phase falls in the period between August and October 2023, during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in December 2023.

Milestones	Beginning	End
Survey Launch	August 16, 2023	
Survey Phase	August 16, 2023	September 13, 2023
Sneak Previews	November 2023	
Press Release & Publication	January 2024	

Please refer to the link to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG
Star of
Excellence

Contacts For This Study

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Sonam
Khanna

**Project
Manager**

Lakshmi Kavya
Bandaru

**Data
Analyst**

ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

James Burke

Partner, Healthcare

SG Anand

Director, Healthcare

Shayne Yeager

Director, Healthcare

Bob Krohn

Partner, Healthcare

Kevin Spiekermann

Account Manager, DACH

**If your company is listed on this page or you feel your company should be listed, please contact ISG
to ensure we have the correct contact person(s) to actively participate in this research.**

Accenture	Cigniti	EMIS Health	HCLTech
Access Health	Cisco Systems	EPAM	Health Catalyst, Inc. (HCAT)
ACL Digital	CitiusTech	Eviden (Atos)	Healthcode Ltd.
Ada Health	Civica	EXL	Healthily
Agfa HealthCare	CliniSys Group	Firstsource	Hewlett Packard Enterprise (HPE)
Allscripts – Veradigm	Coforge	FPT	Hexaware Technologies
Beyondsoft	Cognizant	Fujitsu	HitachiVantara
Birlasoft	Computacenter	Gainwell Technologies	HTC Global
BJSS	Conduent	GAVS Technologies	Huma
Blue Prism	Dedalus	GE Healthcare	IBM
Capgemini	Dell Technologies	Genpact	Infinite
Carelon	Deloitte	Getronics	Infosys
Cera care	DXC	Graphnet Health Ltd.	Intouch with Health
CGI	Emids	Harman	ITC Infotech

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Kainos	Philips Healthcare	Unisys
Kyndryl	Push Doctor	UST
LTIMindtree	PwC	Virtusa
Lumeon	Quantiphi	Wellsky
Mastek	Rackspace	Wipro
Mayden	Siemens Healthineers	WNS
Mphasis	Sitekit Solutions Ltd.	Yash
New Vision	SoftwareONE	
NTT Data	Sopra Steria	
Optum	Sutherland	
Oracle Cerner	System C Healthcare	
Patients Know Best	TCS	
PatientSource	Tech Mahindra	
Persistent Systems	Totalmobile	

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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.

For more information, visit isg-one.com.

AUGUST, 2023

BROCHURE: HEALTHCARE DIGITAL SERVICES