

Healthcare Digital Services

Assessing IT service providers' healthcare
digital transformation capabilities

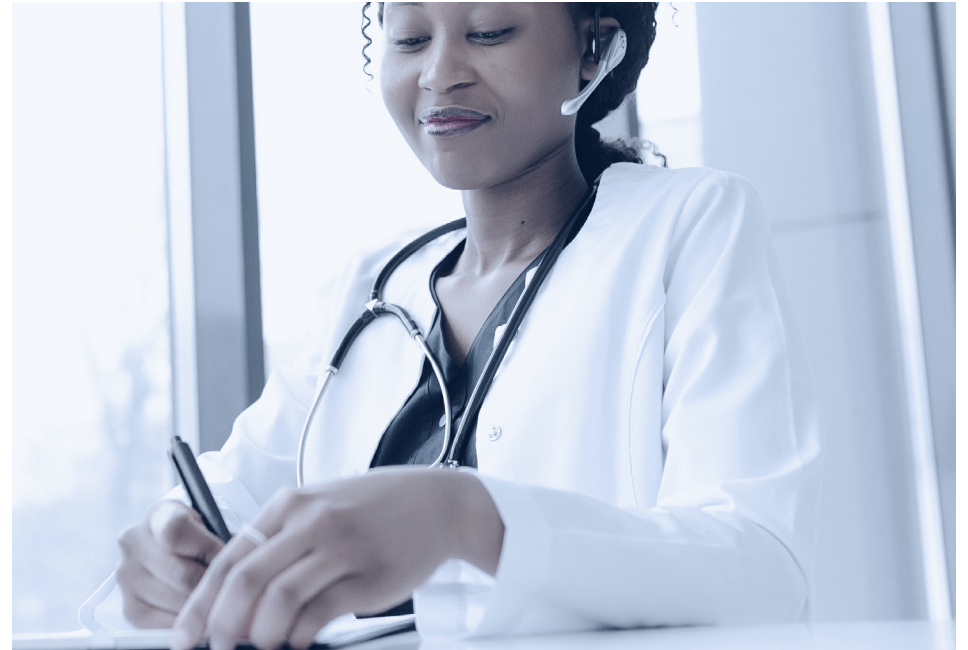


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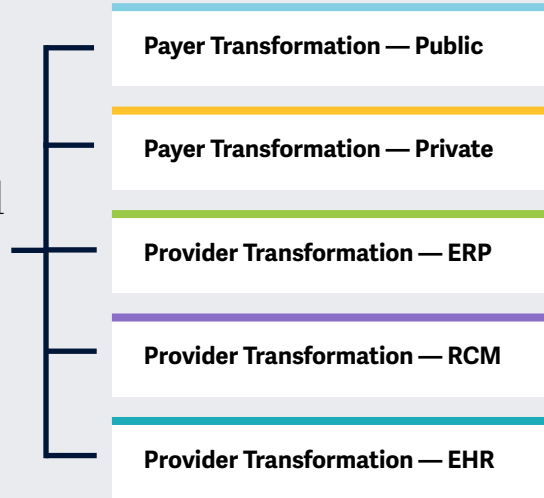
Digital transformation in healthcare is the strategic integration of technologies, such as electronic health records (EHRs), telemedicine, AI and wearable devices, and the use of big data analytics to ensure operational efficiency and optimize patient care, where each technology is associated with certain inherent benefits. AI is crucial for enhancing data management, diagnostics and tailoring treatments to specific patient needs; telemedicine expands access to healthcare through virtual consultations; mobile health (mHealth) uses mobile devices, giving patients control over their health data, following real-time monitoring with wearables and IoT devices; RPA streamlines administrative tasks; and blockchain ensures secure data management across healthcare systems. Patient engagement platforms further personalize healthcare, while ensuring compliance with strict data security regulations to maintain the operational integrity of cloud solutions.

Despite challenges such as interoperability, cyber threats and disparities in digital access, the ongoing digital transformation promises a healthcare system that is efficient, accessible and patient-centric. Evolving regulatory frameworks and technological advances will support this transformation, benefitting both patients and healthcare providers.

The ISG Provider Lens™ Healthcare Digital Services 2024 study will assess providers based on their capacity to enhance clients' technological capabilities, develop robust architectural frameworks and streamline management. Evaluations would focus on their readiness to support future technological advances, offer strategic insights and show a certain preparedness for forthcoming innovations.



The IPL
**Healthcare
Digital Services**
2024 study
focuses on digital
transformation
solutions and
services for
payers and
providers.



Simplified Illustration Source: ISG 2024

Definition

The ISG Provider Lens™ Healthcare Digital Services 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 on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S. and Brazil.

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 Transformation – Public

Definition

In this quadrant, ISG evaluates providers that offer digital transformation services to public sector payers, including government health agencies and public health insurance programs. Digital transformation in the public sector involves integrating advanced technologies to enhance the administration, efficiency and effectiveness of healthcare payer operations. These services aim to modernize processes, improve data management and enhance service delivery. The benefits of digital transformation in the public sector include enhanced operational efficiency, improved data accuracy, augmented regulatory compliance and increased transparency.

This quadrant evaluates providers operating in the US or Brazil or both.

Eligibility Criteria

1. **Have a clear understanding of Brazil/the U.S. public healthcare operations** and be familiar with critical regulations by **CMS and Sistema Único de Saúde (SUS)**. Also, ensuring compliance with other regulations such as, **HIPAA, the Affordable Care Act (ACA)** and other relevant standards to ensure compliance and protect data integrity
2. **Ensure that the systems and technologies it implements align with the payer's processes and objectives**, enhancing overall efficiency and service delivery, with customization addressing each public sector payer's unique requirements
3. **Expertise in integrating and managing advanced technologies** such as **data analytics, AI and ML, cloud computing and cybersecurity** within healthcare payer environments
4. **Proficiency in implementing robust data management and analytics solutions** to enhance data accuracy and **provide actionable insights**.
5. **Capability in developing and integrating systems** that facilitate seamless data exchange between various healthcare entities
6. **Can adopt the latest technologies and best practices**, offering solutions that adapt to future advances and industry standards



Definition

In this quadrant, ISG evaluates providers that offer digital transformation services to private sector payers, including private health insurance companies and managed care organizations. Digital transformation in this context involves integrating advanced technologies to enhance healthcare payer operations, efficiency and effectiveness. These services aim to modernize processes, improve data management and augment service delivery. Digital transformation in the private sector is characterized by numerous benefits such as enhanced operational efficiency, improved data accuracy and regulatory compliance, and increased customer satisfaction.

This quadrant evaluates providers operating in the US or Brazil or both.

Eligibility Criteria

1. **Have a comprehensive understanding of Brazil's Agencia Nacional de Saude (ANS) and private healthcare operations in the U.S., alongside familiarity with critical regulations such as HIPAA and the Affordable Care Act (ACA) to ensure compliance and protect data integrity**
2. **Ensure that the systems and technologies it implements align with the payer's processes and objectives, enhancing overall efficiency and service delivery, with customization addressing each private sector payer's unique requirements**
3. **Expertise in integrating and managing advanced technologies such as data analytics, AI and ML, cloud computing and cybersecurity within healthcare payer environments**
4. **Proficiency in implementing robust data management and analytics solutions to enhance data accuracy and provide actionable insights**
5. **Capability in developing and integrating systems that facilitate seamless data exchange between various healthcare entities**
6. **Can adopt the latest technologies and best practices, offering solutions that adapt to future advances and industry standards**



Provider Transformation – ERP

Definition

In this quadrant, ISG assesses providers offering ERP implementation services to the healthcare industry. These providers specialize in delivering comprehensive software solutions that streamline and integrate the operations of healthcare providers, including hospital systems and independent healthcare organizations. They focus on deploying ERP systems tailored to the unique needs of the healthcare industry, ensuring benefits such as cost savings, improved operational efficiency, enhanced staff collaboration and optimized patient management. The expertise of these providers encompasses the entire implementation process — from initial planning and customization to deployment and ongoing support — enabling healthcare organizations to achieve seamless and effective system integration.

Eligibility Criteria

1. **Have an in-depth understanding of the operations** and challenges pertaining to the healthcare industry, including **regulations such as HIPAA and GDPR**
2. **Experience and specialization** in the healthcare industry, including successful **ERP implementations** for hospitals and independent healthcare organizations.
3. **Possess advanced technical expertise in ERP software**, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
4. **Ability to tailor an ERP system to the specific needs of a healthcare facility** and ensure that it is in alignment with its processes and objectives
5. **Ability to integrate** next-generation technologies such as **AI, ML and analytics** to enhance the functionalities and effectiveness of an ERP system
6. **Can provide post-implementation services** such as troubleshooting, system updates and user training
7. **Offer scalable and flexible solutions** to accommodate organizational growth and evolving healthcare needs



Provider Transformation – RCM

Definition

In this quadrant, ISG evaluates providers specializing in revenue cycle management (RCM) for the healthcare industry, delivering advanced solutions that streamline the financial processes of healthcare organizations. By using sophisticated medical billing software, these providers manage the entire revenue cycle — from patient registration and appointment scheduling to final payment collection. Their services ensure efficient identification, collection and management of revenues from patient services, wherein they integrate administrative and clinical data to enhance billing accuracy, payment processing and claims management. The solutions offered by these providers help healthcare organizations maintain financial stability, improve operational efficiency and achieve full visibility of revenue generation practices.

Eligibility Criteria

1. **Have an in-depth understanding of the operations** and unique challenges of the healthcare industry, including a familiarity with **regulations such as HIPAA and GDPR**
2. **Possess advanced technical expertise in RCM software**, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
3. **Have proficiency in implementing tailored RCM solutions** for hospital systems and independent healthcare givers and managing the entire revenue cycle — from patient registration to payment collection.
4. **Ability to handle key revenue cycle** activities such as charge capture; claim submission; coding; patient collections; pre-registration, registration and remittance processing; fostering operational efficiency; and regulatory compliance.
5. **Ability to integrate next-generation technologies** such as **AI, ML, IoT and analytics** to enhance the functionalities and effectiveness of an RCM system
6. **Has a team of experts with the relevant skills** to implement and support advanced technologies, including data analytics and GenAI and cybersecurity components, to ensure the security, scalability and accessibility of an RCM system — in short, **robust support for healthcare providers in delivering high-quality patient care.**



Definition

In this quadrant, ISG evaluates providers that offer electronic health record (EHR) implementation services to healthcare providers. These services encompass the strategic planning, technical expertise and practical support needed to integrate EHR systems seamlessly into healthcare organizations.

The process involves assessing healthcare providers' operational workflows and regulatory requirements and carefully selecting and customizing EHR platforms tailored to their specific needs. Covering data migration and system configuration to comprehensive training and ongoing support, these services ensure that healthcare professionals can efficiently adopt and leverage EHRs to enhance patient care, streamline administrative processes and comply with industry standards.

Ultimately, the effective delivery of EHR implementation services drives digital transformation across the healthcare industry, fostering improved clinical outcomes and operational efficiencies.

Eligibility Criteria

1. **Have an in-depth understanding of the operations** and unique challenges of the healthcare industry, including a familiarity with regulations such as HIPAA and GDPR
2. **Possess advanced technical expertise in EHR software**, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
3. **Ability to tailor EHR systems/platforms to the specific needs** of a healthcare facility and in alignment with its processes and objectives, with the capability to scale the system in the future as an organization grows or new technologies emerge
4. **Ability to integrate next-generation technologies such as AI, ML, IoT and analytics** to enhance the functionalities and effectiveness of an EHR system that has the capabilities and methodologies for data migration, thus ensuring data integrity and security
5. **Has a team of experts with the relevant skills** to implement and support advanced technologies, including data analytics, GenAI and cybersecurity components, to ensure the security, scalability and accessibility of an EHR system – in short, **robust support for healthcare providers in delivering high-quality patient care**
6. **Offer robust post-implementation support**, including troubleshooting and system updates



ISG's Healthcare Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Healthcare market and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant 2024 study, we are introducing the following five quadrants on Healthcare Digital Services:

Quadrants	Brazil	U.S.
Payer Transformation — Public	✓	✓
Payer Transformation — Private	✓	✓
Provider Transformation — ERP	✓	✓
Provider Transformation — RCM	✓	✓
Provider Transformation — EHR	✓	✓



The research phase falls in the period between July and August 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in November 2024.

Milestones	Beginning	End
Survey Launch	July 24, 2024	
Survey Phase	July 24, 2024	August 21, 2028
Sneak Preview	November 2024	December 2024
Press Release & Publication	December 2024	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 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



The ISG Provider Lens 2024 – Healthcare Digital Services study analyzes the relevant software vendors/service providers in the global 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 June 2024, 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.



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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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT 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



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Healthcare**



Shayne
Yeager

**Director –
Healthcare**



SG
Anand

**Director –
Healthcare Services**



Invited Companies

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.

* Rated in the previous iteration

Accenture*

Allscripts – Veradigm

Alvarez and Marsal

Atos*

Avvale

Axway

Ayko Technology

BCI Consulting

Beyondsoft*

Birlasoft

BJSS

Blue Prism

Capgemini*

Carelon

Cast group

CGI

Cigniti*

Cisco Systems

CitiusTech*

Claranet

Coforge*

Cognizant*

Computacenter

Conduent*

CTC

Dasa

Dell Technologies

Deloitte*

DGS Brasil

DXC Technology*

Embratel

Emids*

EPAM

EPI-USE

Essence

Eviden (an Atos business)*

Evox Solutions

Eximio

EXL*

EY

FCamara

Firstsource*

Folks

FPT

Fujitsu

Funcional Health Tech

Gainwell Technologies

GE HealthCare



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* Rated in the previous iteration

Genpact*	HTC Global Services*	Lanlink	Nuria
Get Connect	IBM*	LTIMindtree*	Optum*
Globalthings	Inetum	Mastek*	Perficient
Globant	Infinite Computer Solutions*	Memed	Persistent Systems*
GS Lab GAVS*	Infosys*	Mphasis*	Philips Healthcare
Guidehouse	Innova Solutions	MPL	Pixeon
HARMAN*	Intmed Software	Munai	Planium
HCLTech*	Intuitive Care	NEORIS	PwC*
Health Catalyst (HCAT)	IQVIA*	NeuralMed	Qualirede
HealthBit	ITC Infotech	New Vision	Quantiphi*
Hewlett Packard Enterprise (HPE)	Kainos	Nilo Saúde	Rackspace Technology*
Hexaware*	KPMG	Ninecon	Saúde Hi
Hitachi Digital Services*	Kyndryl*	NTT Data*	SEIDOR



Invited Companies

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.

* Rated in the previous iteration

Softtek
SONDA
Stefanini
Sutherland
Tascom
TATA Elxsi*
TCS*
Tech Mahindra*
Teleinfo Soluções

The Silicon Partners Inc
TIVIT
Triágil
T-Systems
Unisys
UpFlux
UST*
V8.TECH
Virtusa

WellSky
Wipro*
WNS*
Wolters Kluwer
Yash Technologies
ZG Soluções



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 AI and 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 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.





JULY, 2024

REPORT: HEALTHCARE DIGITAL SERVICES