ISG Provider Lens®

AI Services
in Healthcare

A research report comparing providers' AI strengths,
challenges and competitive differentiators

BROCHURE | **APRIL 2026** | **GLOBAL**

Table of Contents 🏠

Introduction

The use of AI service in healthcare is accelerating rapidly as the industry shifts toward intelligent, data-driven care. Healthcare organizations are increasingly using AI to reduce clinical burden, streamline operations and improve experiences. Alongside traditional AI, GenAI and agentic-AI models expand automation, reasoning and orchestration capabilities across clinical and operational workflows. Multimodal models enable ambient clinical documentation, automated prior authorization, imaging triage, care navigation, coding assistance and personalized patient engagement. GenAI-enabled summarization, retrieval-augmented generation (RAG) and emerging multiagent patterns further enhance context-aware decision flows.

Key areas of growth using AI include clinical decision support, medical imaging, virtual care, revenue cycle automation and population health analytics, with domain-adapted LLMs, healthcare-tuned models and agentic-AI orchestration driving adoption across these use cases. Cloud-based AI platforms, interoperability standards such as FHIR and integrated LLMOps practices enable secure,

scalable deployment. Collaboration among service providers, payers, healthcare systems and hyperscalers is essential to prototype and scale AI solutions.

However, the industry faces major challenges, including data fragmentation, privacy and regulatory constraints, stringent clinical validation requirements, workforce readiness gaps, legacy integration complexity and risks of AI bias and hallucination. Agentic AI also requires autonomy guardrails, oversight and safety management. Trust, safety and consistent performance are critical as healthcare organizations move from experimentation to real-world adoption.

This study assesses IT providers' strengths in AI strategy and solution delivery across healthcare organizations and payer needs.

Simplified Illustration Source: ISG 2025

Healthcare AI Strategy and Advisory Services

Healthcare AI Development and Delivery Services

Scope of the report

The ISG Provider Lens® AI Services in Healthcare 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 the global market

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.

Healthcare AI Strategy and Advisory Services

Definition

This quadrant evaluates providers of healthcare AI strategy and advisory services, focusing on the ones that help payers and healthcare organizations plan, prioritize and govern AI, GenAI and agentic AI adoption. These services guide organizations through a complex landscape of rising clinical burden, operational pressures and advancing technological capabilities. Providers in this quadrant assess high-value use cases, create organizational AI roadmaps, evaluate data and platform readiness and establish responsible AI frameworks aligned with healthcare regulations. They offer expertise in selecting and validating healthcare-specific LLMs, ensuring alignment with clinical, operational and financial goals. Also, they support change management and workforce enablement, fostering scalable adoption.

Overall, this quadrant highlights provider partners helping organizations involved in healthcare adopt AI strategically, safely and with measurable impact.

Eligibility Criteria

1. Proven **expertise with healthcare payer and organization** use case references

2. Ability to assess **AI/GenAI/ agentic AI readiness** across **data, platforms** and **workflows**

3. Strong **understanding of healthcare-specific LLMs,** multimodal models and cloud ecosystems

4. **Experience in building AI roadmaps,** value assessments and business cases

5. **Robust responsible AI frameworks,** compliant with HIPAA, GDPR, CMS and FDA's safety, **fairness and transparency mandates)**

6. Ability to **design governance structures and risk mitigation** processes for **AI, GenAI and agentic AI**

7. Demonstrated clinician, operational and data science **expertise for cross-functional advisory**

8. **Portfolio with change management,** communication and training programs to support the adoption and scaling of solutions

Healthcare AI Development and Delivery Services

Definition

This quadrant evaluates providers of healthcare AI development and delivery services, focusing on the ones that design, build, deploy and operationalize AI, GenAI and agentic AI solutions for payers and healthcare organizations. These services turn priority use cases into production-ready applications through model development, data engineering, secure cloud architecture and integration with electronic health records (EHRs), claims and imaging systems. Providers support PoCs, minimum viable products (MVPs) and full-scale deployments; fine-tune healthcare-specific models; and implement LLMOps practices for monitoring, retraining and performance optimization, while increasingly incorporating RAG pipelines, agent orchestration patterns and safety guardrails to enable more autonomous workflows. They ensure HIPAA-compliant data handling, strong security, and clinical and operational safety throughout the AI lifecycle.

Overall, this quadrant highlights provider partners capable of delivering scalable, reliable and compliant AI solutions that drive measurable improvements across care delivery, administration and member services.

Eligibility Criteria

1. Proven **experience in building and deploying AI/GenAI/agentic AI solutions** for payers and healthcare organizations

2. Expertise in **model development; fine-tuning healthcare LLMs;** and handling clinical, claims and imaging data

3. **Strong data engineering capabilities** (FHIR/HL7/DICOM pipelines and PHI -safe workflows)

4. **Capabilities in designing HIPAA-compliant,** cost-efficient cloud and GPU architectures

5. Established **LLMOps/MLOps practices for monitoring,** retraining, drift detection and performance optimization

6. Deep **understanding of integration with EHRs,** care management platforms, RIS/PACS and payer systems

7. **Robust security, access control, encryption and compliance** controls across the AI lifecycle

8. **Skilled cross-functional teams** in data science, cloud engineering, clinical informatics and product delivery

ISG's Healthcare Digital Service Framework*

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing with AI across the Healthcare Digital Services and helps connect them to the AI solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- The outer highlighted tiles represent areas where AI initiatives are being pursued and explored
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions

Green tiles represent where an ISG Software Research will produce a Buyers Guide in 2025

Advocacy & Lobbying (Represent Interests in Legislation)

Public Healthcare Informatics (Data for Research/ Decisions)

Appointment Scheduling / Patient Navigation (Efficient Check-in)

Patient Education/ Communication (Clear Personal Health Info)

Regulatory Consulting (Navigate Complex Regulatory Requirements)

Ethics & Compliance Training

Telehealth Policy & Regulation

Insurance Verification/ Eligibility (Accurate Billing Information)

New Patient Registration/ Onboarding

Digital Front Doors /telemedicine (Access Remote Healthcare)

Policy Analysis (Adapt to Evolving Healthcare Policies)

Policy, Regulation & Advocacy

Patient Access & Engagement

Patient Data analytics (Gaps and Opportunities)

Ensure Policy is Up-to-date and Continually Reviewed

Onboard & Provide Access to Patients

Electronic Health Records / Interoperability (EHR and Data Sharing)

Care team Collaboration (Intra-healthcare Communication)

Data Interoperability Standards (Seamless Data Exchange)

Disaster Recovery & Business Continuity (Availability in Crisis)

Ensure Information is Secure, Private & Available at All Times

ISG Healthcare Framework

Deliver, Track, Record and Support Patient Outcomes

Care Delivery & Coordination

Patient Support Programs (Navigating Healthcare)

Chronic Disease Management

Secure Communications Platforms (Protect Sensitive Communications)

Cybersecurity & Data Protection (Safeguard Data)

Health Information Security & Compliance

Personalized Healthcare & Prediction of Outcomes

Bill Patients Accurately & Fairly

Care Transitions/ Discharge Planning (Intra-care Transitions)

Remote Patient Monitoring (Real-time Tracking)

Identity & Access Management (Access Control)

HIPAA Compliance & Audits (Regulatory Adherence)

Community Health Partnerships

Population Health Management

Revenue Cycle Management

Charge Capture & Coding (Accurate Billing)

Social Determinants of Health (SDoH) Integration (Address Social Factors)

Health Risk Assessments (Individual Risks / Needs)

Risk Stratification / Predictive Analytics (Target High Risk Patients)

Revenue Integrity / Compliance (Billing Reg Reqs)

Value-Based Payment Models (Outcome Focused Reimbursement)

Claims Processing / Adjudication (Claims Reimbursement Mgmt)

Patient Engagement Platforms (Engage through Platform of Choice)

Preventative Care Programmes (Promote Wellness)

Pricing Estimation / Transparency (Upfront Cost Estimates)

Denial Management / Appeals (Resolve / Prevent Claims Denials)

***- Not exhaustive and continually being enhanced**

Quadrants by Region

As part of this ISG Provider Lens® quadrant study, we are introducing the following two quadrants on AI Services in Healthcare 2026:

Quadrant	Global
Healthcare AI Strategy and Advisory Services	✔
Healthcare AI Development and Delivery Services	✔

The research phase falls in the period between December 2025 and February 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in March 2026.

Milestones	Beginning	End
Survey Launch	December 12, 2025	
Survey Phase	December 15, 2025	January 20, 2026
Sneak Preview	March 2026	
Press Release & Publication	April 2026	

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® 2025 research agenda.

Access to Online Portal

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

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyer's Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the AI Services in Healthcare IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of conducting 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 Voice of the Customer concept. ISG has designed the Star of Excellence program 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 are 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 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.

Our vision for the Star of Excellence is to become acknowledged 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 "Nominate (for Providers)" 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:
star@cx.isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens® March 2026 – AI Services in Healthcare 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.

Study Sponsor:
Iain Fisher

Lead Analyst &
Research Analyst - Global:
Rohan Sinha and Sneha Jayanth

Data Analyst:
Kruthika Sulghur

Project Manager:
Sreya Ghosh

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of April 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

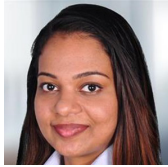## Contacts For This Study

Study Sponsor

Iain Fisher

Study Sponsor - Global

Rohan Sinha

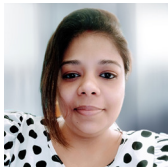**Lead Analyst & Research Analyst - Global**

Sneha Jayanth

Lead Analyst & Research Analyst - Global

Kruthika Sulghur

Data Analyst

Sreya Ghosh

Project Manager – Global

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 consultant 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 for this study

James Burke

Partner

Shayne Yeager

Director

SG Anand

Director

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.

A3Data	Capgemini	DGS Brasil	GHR Business Solutions
Accenture	Carelon	DXC Technology	Globalthings
Access Healthcare	Cast Group	EMIDS	Globant
AGS Health	CGI	Ensemble Health Partners	GAVS
Allscripts – Veradigm	chetu	EPAM	Guidehouse
Alvarez and Marsal	Cigniti	Evox Solutions	HARMAN Digital Transformation Solutions
Atos	Cisco Systems	EXL	HCLTech
AVN Tecnologia	CitiusTech	EY	Health Catalyst, Inc. (HCAT)
Avvale	Claranet	Firstsource	Hewlett Packard Enterprise (HPE)
Axway	Coforge	Folks	Hexaware
Ayko Technology	Cognizant	Fujitsu	Hitachi Digital Services
BCI Consulting	Compass UOL	Gainwell Technologies	HTC Global Services
Benner	Computacenter	GE HealthCare	Huron Consulting
Beyondsoft	Conduent	Genpact	IBM
Birlasoft	Deloitte	Get Connect	Impact Advisors

Invited Companies

Inetum

Infinite Computer Solutions

Infosys

Innova Solutions

Intmed Software

Intuitive Care

IQVIA

ITC Infotech

Kainos

KPMG

Kyndryl

LTIMindtree

Mastek

Memed

Mphasis

MPL

NeuralMed

New Vision

Nordic

NTT Data

Optum

Perficient

Persistent Systems

Philips Healthcare

Pivot Point Consulting

PwC

Quantiphi

R1rcm

Rackspace Technology

Sagility Health

Softtek

Stefanini

Sutherland

TATA Elxsi

TCS

Tech Mahindra

Tegria

T-Systems

Unisys

UST

V8.TECH

Virtusa

WellSky

Wipro

WNS

Yash Technologies

ZG Soluções

About Our Company & Research

ÏSG 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. 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.

ÏSG 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.

ÏSG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens®

APRIL, 2026

REPORT: AI SERVICES IN HEALTHCARE