

# Intelligent Healthcare Transformation Services

Evaluating service providers enabling digital,  
data and AI-led transformation across healthcare  
payers and providers



|                             |    |                               |    |
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Healthcare organizations are undergoing significant transformation in response to rising operational costs, workforce shortages, increasing regulatory requirements and growing expectations for connected, consumer-centric experiences. Concurrently, advances in cloud, data platforms, automation, analytics and AI are creating opportunities to improve efficiency, enhance engagement and deliver better business and care outcomes.

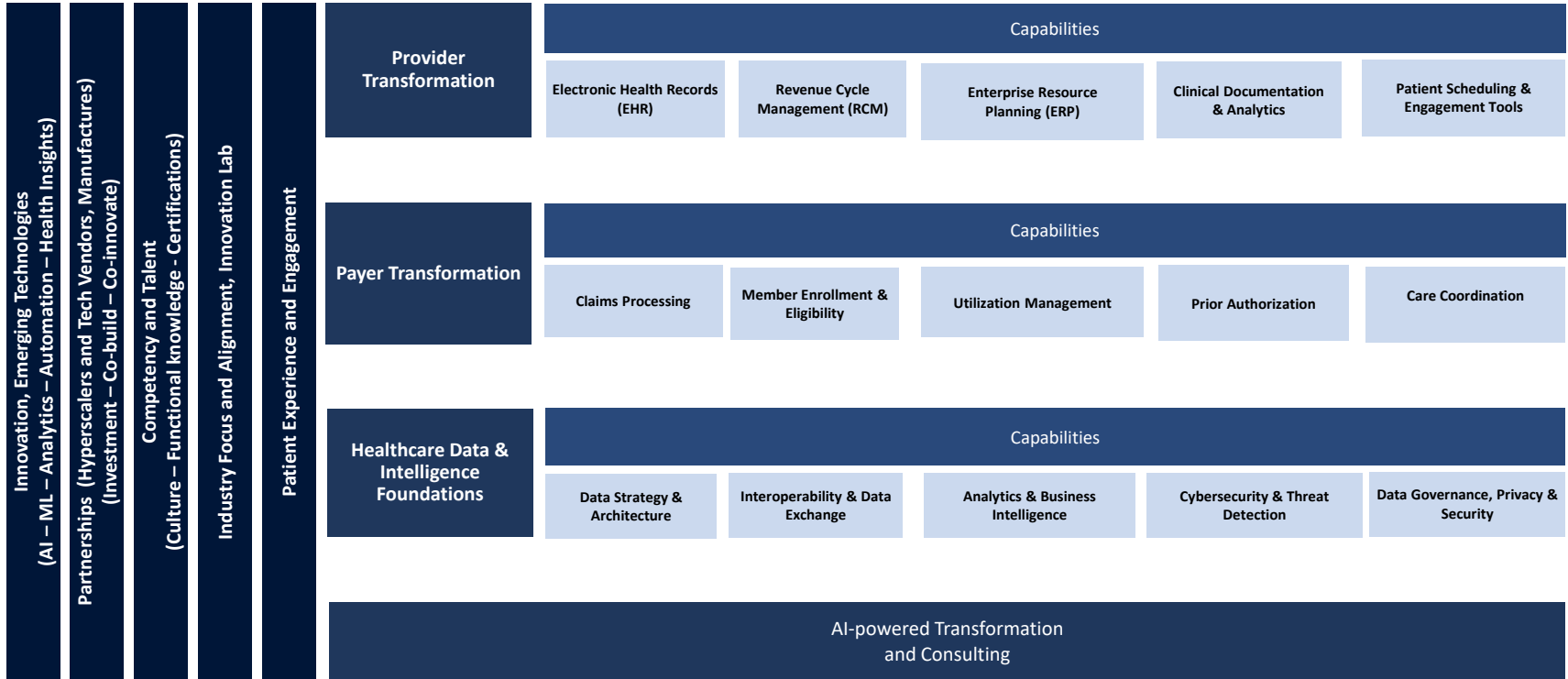
Payers are modernizing core administration, claims operations, care management, member engagement and value-based care capabilities. Providers are optimizing clinical and operational workflows, strengthening patient engagement, improving revenue cycle performance, expanding digital care models and reducing administrative burden through automation and AI. Across both segments, organizations are building more agile, data-driven operating models that can adapt to evolving market and regulatory demands.

As transformation initiatives become more complex, healthcare organizations are turning to IT service providers for specialized expertise, technology innovation and execution support. Leading providers differentiate through deep healthcare domain knowledge, strong digital engineering, proven cloud and AI expertise, and a track record of measurable business outcomes.

The Intelligent Healthcare Transformation study evaluates providers across Payer Transformation, Provider Transformation, and Healthcare Data & Intelligence Foundation capabilities, identifying those best positioned to help healthcare organizations accelerate modernization and build more intelligent, resilient and future-ready enterprises.



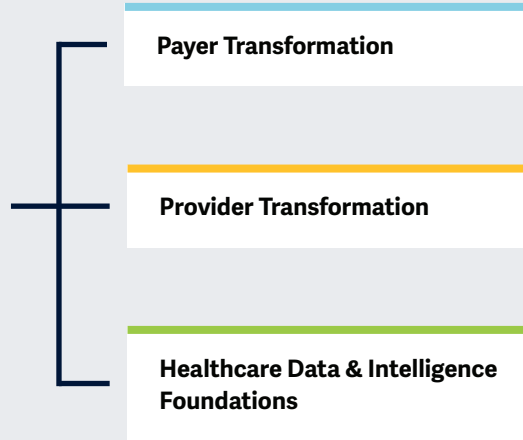
Blueprint – Intelligent Healthcare Transformation Services



\*Non-exhaustive



The study evaluates service providers that **deliver digital, data, AI and operational transformation services** to healthcare payers and providers.



Simplified Illustration Source: ISG 2026

### Scope of the report

**The ISG Provider Lens® Intelligent Healthcare Transformation 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 U.S. market

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



## Payer Transformation

### Definition

In this quadrant, ISG assesses providers offering transformation services to healthcare payers, including health insurers, managed care organizations and government health plans. Payer transformation modernizes operations, core platforms and member-facing processes through cloud, data, automation and AI to improve efficiency, enhance member experiences, reduce costs and enable value-based care.

Services include claims transformation, care and utilization management, member engagement, core platform modernization and digital channel enablement. Service providers are increasingly leveraging AI and GenAI to automate claims and prior authorization, strengthen fraud detection, enable predictive risk management and deliver personalized member experiences.

The focus is on building intelligent, data-driven payer organizations through modern data platforms, interoperability, advanced analytics and secure information exchange. Expected benefits include streamlined operations,

stronger compliance, faster decision-making, higher member satisfaction and better health and business outcomes.

### Eligibility Criteria

1. Comprehensive understanding of **payer operations**, including **claims administration**, **care management**, **payment integrity**, **member engagement**, **value-based care models** and relevant **healthcare regulations**
2. Use of advanced technologies, including **cloud**, **automation**, **AI**, **GenAI**, **analytics**, **interoperability** and **cybersecurity**, to modernize **legacy systems**, improve **operational efficiency** and enable **data-driven decision-making**
3. Seamless integration across **core payer platforms**, **third-party applications** and **healthcare data networks** through **interoperability frameworks**, **APIs** and **standards-based data exchange** capabilities
4. Strong **data**, **AI** and **governance** capabilities, including **modern data platforms**, **responsible AI frameworks**, **data quality management**, **security controls**, **privacy safeguards** and **regulatory compliance** processes
5. Proven **execution capabilities** through **healthcare-specific accelerators**, **skilled talent**, **scalable delivery models**, **partnerships** and **transformation engagements** with measurable business outcomes
6. Ability to articulate **value realization** through defined **KPIs**, **operational improvements**, **cost optimization**, **enhanced member experiences**, **improved health outcomes** and measurable **ROI**



## Provider Transformation

### Definition

In this quadrant, ISG evaluates providers delivering transformation services to healthcare providers, including hospitals, health systems, clinics and physician groups. Provider transformation leverages digital technologies, data, automation and AI to improve clinical outcomes, enhance patient experiences and optimize operational efficiency.

Key offerings include EHR modernization, interoperability, revenue cycle transformation, patient engagement, virtual care, clinical workflow optimization, cloud migration, cybersecurity, and data and analytics. Service providers are increasingly leveraging AI and GenAI to automate administrative tasks, support clinical decision-making, improve diagnostic accuracy, enable predictive care and enhance workforce productivity.

The focus is on building connected, data-driven healthcare ecosystems through interoperable platforms, secure information exchange, real-time insights and AI-powered decision support. Expected benefits include improved care quality, reduced administrative

burden, enhanced patient experiences, better operational performance, and more personalized, efficient care delivery.

### Eligibility Criteria

1. Comprehensive understanding of **clinical workflows, care delivery processes, healthcare operations** and relevant **healthcare regulations**
2. Integration of advanced technologies, including **EHR, AI, GenAI, automation, virtual care, cloud, analytics, IoT-enabled medical devices** and **interoperability frameworks** to modernize **clinical and operational environments**
3. **Security, data privacy and risk management frameworks** to protect sensitive **patient and organizational data**, with defined **compliance, governance and incident response processes**
4. **Interoperability and integration across EHRs, clinical applications, medical devices, third-party solutions and health information exchanges** to support **coordinated and data-driven care delivery**
5. Use of **AI-powered decision support, predictive analytics, clinical intelligence and intelligent automation** to improve **care quality, operational efficiency, workforce productivity and patient outcomes**



6. Agile and scalable delivery approaches supported by healthcare-skilled talent, partnerships and proven methodologies to address evolving clinical, operational, regulatory and technology requirements
7. Measurable outcomes related to patient experience, clinical effectiveness, operational efficiency, cost optimization and broader digital transformation objectives



## Healthcare Data & Intelligence Foundations

### Definition

In this quadrant, ISG evaluates providers delivering healthcare data and intelligence foundation services that help healthcare organizations build secure, scalable and AI-ready data ecosystems. These services enable payers and providers to integrate, govern and leverage healthcare data to improve decision-making, operational efficiency and business outcomes.

Key offerings include data strategy, cloud data platforms, data engineering, governance, interoperability, analytics, business intelligence, and AI and ML enablement. Providers increasingly leverage GenAI, predictive analytics, NLP and intelligent automation to transform healthcare data into actionable insights.

The focus is on establishing modern data foundations, such as lakehouse, data fabric and data mesh architectures, while enabling seamless data exchange using standards like HL7, FHIR and DICOM.

There is a strong focus on data privacy, security, governance, regulatory compliance and responsible AI.

### Eligibility Criteria

1. Comprehensive understanding of **healthcare data ecosystems**, including **clinical, claims** and **operational data**, with expertise in **data strategy, enterprise architecture** and healthcare data standards
2. Ability to design and implement modern **data platforms** and **cloud-based architecture**, including **data lakehouse, data mesh** and **data fabric** environments that support scalable and future-ready data foundations
3. Seamless **interoperability, data integration** and **data exchange** across healthcare ecosystems through support for standards such as **FHIR, HL7** and **DICOM** and API-based architectures
4. Robust **data governance, data quality, master data management, metadata management** and **data lineage** capabilities to ensure reliable data assets
5. Use of **AI, GenAI, ML, predictive analytics, NLP** and **intelligent automation** to generate actionable insights and support data-driven decision-making
6. Strong **security, data privacy, consent management** and **regulatory compliance** practices to protect sensitive healthcare information
7. Measurable outcomes related to **data modernization, analytics maturity, AI adoption, operational efficiency, interoperability**, and overall **business value realization**



## ISG's Intelligent Healthcare Transformation Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Intelligent Healthcare Transformation 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 part of this ISG Provider Lens® quadrant study, we are introducing the following three quadrants on Intelligent Healthcare Transformation Services 2026:

| Quadrant                                   | U.S. |
|--|------|
| Payer Transformation                       | ✓    |
| Provider Transformation                    | ✓    |
| Healthcare Data & Intelligence Foundations | ✓    |



The research phase falls in the period between June and July 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2026.

| Milestones                  | Beginning     | End            |
|-----------------------------|---------------|----------------|
| Survey Launch               | June 17, 2026 |                |
| Survey Phase                | June 17, 2026 | July 17, 2026  |
| Sneak Preview               | August 2026   | September 2026 |
| Press Release & Publication | October 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 [ISG Provider Lens® 2026](#) research agenda to view and download the list of other studies conducted by ISG Provider Lens®.

**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!

**Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers 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 Intelligent Healthcare Transformation Services 2026 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](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



## Methodology & Team

The ISG Provider Lens® 2026 – Intelligent Healthcare Transformation 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 Author:**

Rohan Sinha and Sneha Jayanth

**Editors:**

Dona George

**Research Analyst:**

Karun Elancheran

**Data Analyst:**

Sachitha Kamath

**Project Manager:**

G K Vaishnavi

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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 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 June 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  
  
**Director**



Rohan  
Sinha  
  
**Senior Manager and  
Principal Analyst**



Sneha  
Jayanth  
  
**Lead Analyst**



Karun  
Elancheran  
  
**Senior Research  
Analyst**



Sachitha  
Kamath  
  
**Senior Data Analyst**



G K  
Vaishnavi  
  
**Associate Project  
Manager**



### ISG Provider Lens® 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 - Healthcare  
Services**



SG  
Anand

**Director - Healthcare  
Services**



Shayne  
Yeager

**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.**

\* Rated in previous iteration

|                    |                       |                              |                       |
|--------------------|-----------------------|------------------------------|-----------------------|
| Accenture*         | Coforge*              | GE HealthCare                | Innova Solutions*     |
| Access Healthcare  | Cognizant*            | Genpact*                     | Innovaccer            |
| AGS Health         | Computacenter         | Globant                      | IQVIA                 |
| Alvarez and Marsal | Conduent              | Guidehouse                   | ITC Infotech          |
| Arcadia            | Deloitte*             | HARMAN                       | Kainos                |
| Atos*              | DXC Technology*       | HCLTech*                     | KPMG                  |
| Avvale             | Edifecs               | Health Catalyst, Inc. (HCAT) | Kyndryl*              |
| Axway              | EMIDS*                | Hexaware*                    | LTM*                  |
| Beyondsoft         | EPAM                  | Hitachi Digital Services*    | Mastek*               |
| Birlasoft          | EXL*                  | HTC Global Services*         | Mphasis*              |
| Capgemini*         | EY                    | Huron Consulting             | Neurealm              |
| Carelon            | Firstsource*          | IBM                          | Nordic                |
| CGI                | FPT                   | Impact Advisors              | NTT DATA*             |
| Chartis            | Fujitsu               | Infinite Computer Solutions* | Optimum Healthcare IT |
| CitiusTech*        | Gainwell Technologies | Infosys*                     | Optum                 |



## Invited Companies

|                        |                   |
|------------------------|-------------------|
| Perficient             | Unisys            |
| Persistent Systems*    | UST*              |
| Pivot Point Consulting | Veradigm          |
| PwC                    | Virtusa*          |
| Quantiphi              | Wipro*            |
| R1 RCM                 | WNS               |
| Rackspace Technology*  | Yash Technologies |
| Sagility Health        |                   |
| Softtek*               |                   |
| Stefanini              |                   |
| Sutherland*            |                   |
| Tata Elxsi*            |                   |
| TCS*                   |                   |
| Tech Mahindra*         |                   |
| T-Systems              |                   |



## 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](#).

## 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 and cities) and higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## 

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](http://isg-one.com).





**JUNE, 2026**



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